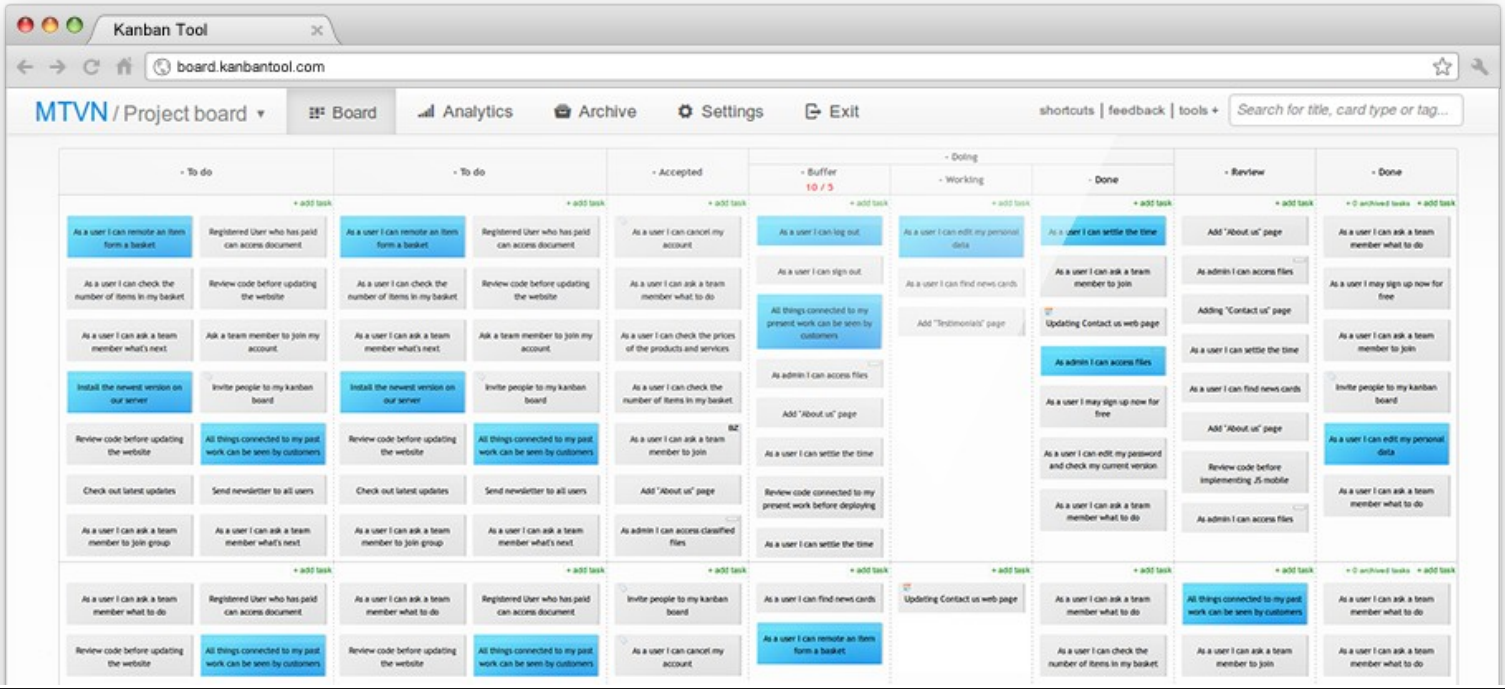
Kanban Tool

User Manual



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Dear User, welcome to the KanbanTool quick guide manual. On the following pages you will find a collection of KanbanTool's most important functions, that will allow you to start managing your project without any further delay.

1. Creating your first board using a template

First of all you will need to create at least one board to work on. When you log in to your account please select the option "Create new board" visible on the vertical panel on the right side of your screen.
In this section you are able to name your board, provide a short description and, most importantly, choose one of the pre-defined types of the board that will allow you to start the work as quickly as possible.
There are two kinds of boards – simple and team, each with three sub-types:

Simple Kanban:

A Basic Kanban Board template

This is a very simple workflow, suitable for basic personal work and time management. It has three self-descriptive states:

- **To do** to store and organize things you want to work on.
- **In progress** with limit to keep you from doing too many things at the same time.
- **Done** for reference and to track your performance.

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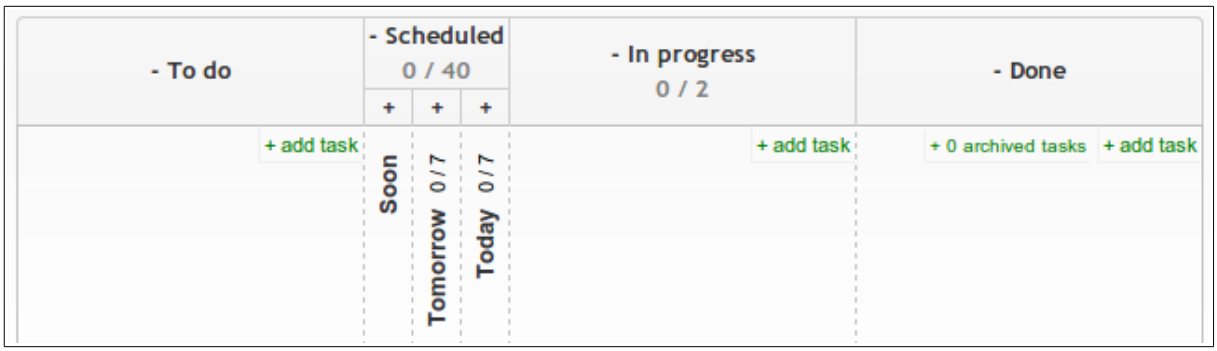
A Time driven Kanban Board template

The time driven version of basic workflow. Works best if you plan in a time based manner. The board layout looks as follows:

- **To do**
- **Scheduled** with three categories:
  - **Soon** - things to do in near future
  - **Tomorrow** - limited number of things scheduled for tomorrow
  - **Today** - things to do today with limit of 7 cards to keep you focused and organized
- **In progress** with limit to keep you from doing too many things at the same time.
- **Done** for reference and to track your performance.



An event driven Kanban Board template

The event driven version of a basic workflow works best when some external event (like approval, or a pre-defined completion of a particular stage etc.) determines which tasks are ready to be worked on next. The board layout looks as follows:

- **To do** with three categories:
  - **Backlog** - things to do some time in future
  - **Waiting** – a limited number of selected tasks waiting for some event to happen (i.e. approval)
  - **Ready** - things ready to start working on

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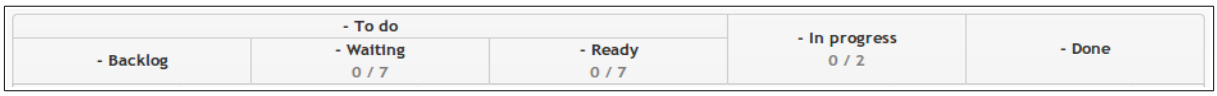
- **In progress** with an all important limit to keep you from doing too many things at the same time.
- **Done** for reference and to track your performance.

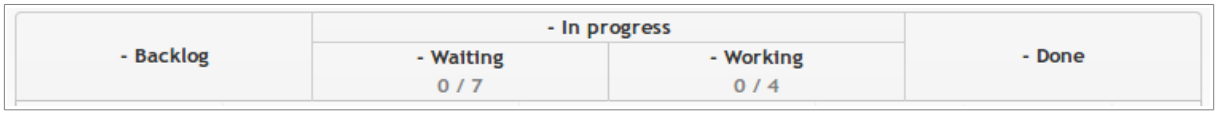


Team Kanban Board:

A Basic Team Board template

Team boards use buffers to signal that tasks are ready to be pulled to the next workflow stage, possibly by other team members. The board layout looks as follows:

- **Backlog** - containing all the things a team can work on
- **In progress** with two columns:
  - **Waiting** - for tasks ready to be pulled when enough capacity is reached
  - **Working** - limited number of tasks currently being worked on
- **Done** for keeping a reference and to monitor team performance.



A Team Board template for product development

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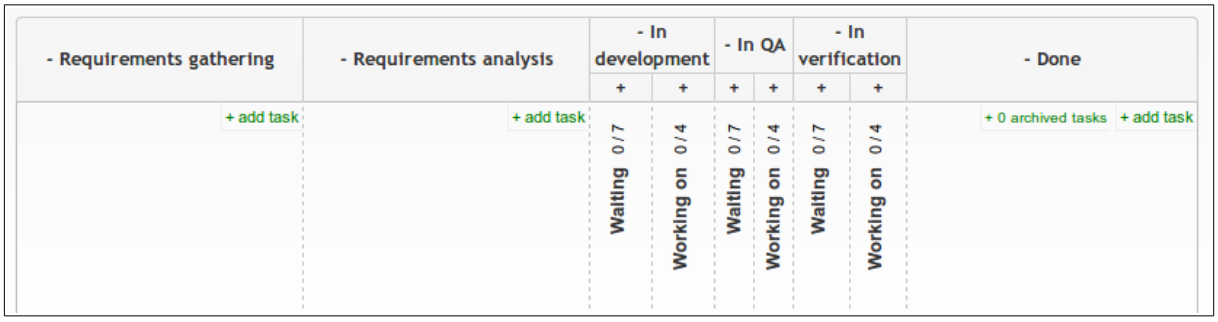
This template can act as a base for describing a product development process.

- Requirements gathering
- Requirements analysis
- In development
  - Waiting
  - Working on
- In QA
  - Waiting
  - Working on
- In verification
  - Waiting
  - Working on
- Done for keeping a reference and to monitor team performance.



A Team Board template for sales pipeline management

This template can act as a base for describing your sales pipeline.

- Leads
- New opportunities
- Initial communication
- Solution development
- Proposal
- Solution evaluation
- Negotiation
- Closed

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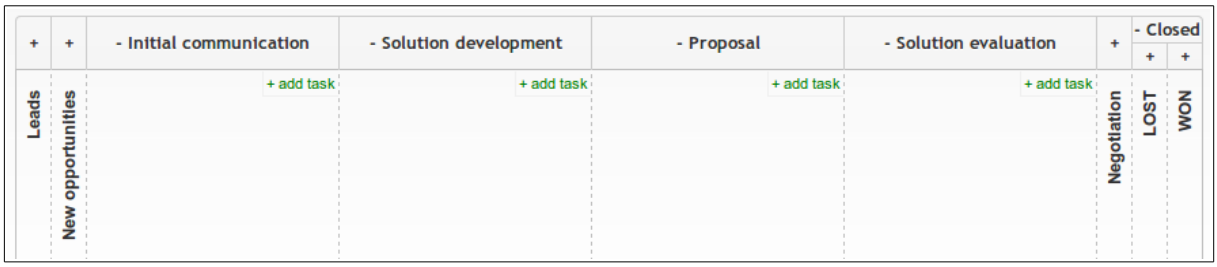
- LOST
- WON



Creating folders:

For better organization, KanbanTool allows creating folders, in which you can store your boards (very helpful once you get going and end up with a lot of boards). While on the Dashboard, just click Create new folder. To place a board in a folder, go to “more” option and choose the “move” option to decide where to put your board.

A word on initial clarity:

As you can see, there are many available options of designing the board to suit the needs of a particular team or project. At first glance it may look confusing, but we do not want you to get confused. For this reason, it is best to start with any of the basic Kanban Boards and suitably develop them on further steps of the project depending on your needs. This way you can avoid confusion among the team members that need to learn the tool as well – keep it simple from the beginning and it will stay simple even when you've created a whole network of projects.
Before you leave the board creation screen, you can tick the option “*I want to further customize this board”* to be transferred to the board edition screen.

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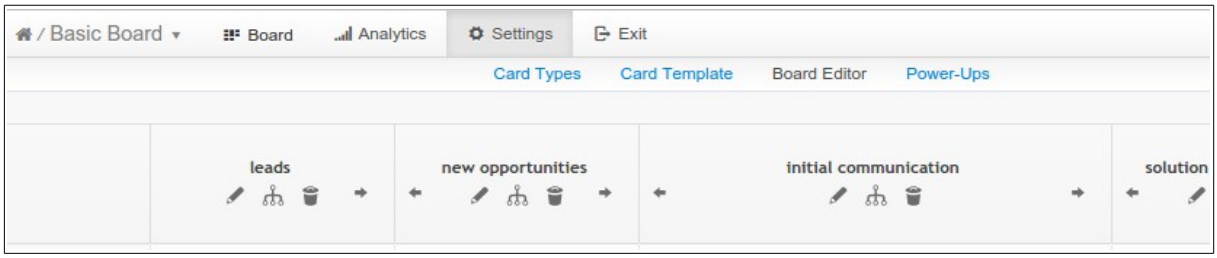
2. Customizing your board

Board edition screen is the place where you can change the layout of your board, as well as add further columns and swimlanes that will suit your project flow.
The board edition screen is accessible through Settings -> Board Editor, located in the horizontal bar on the top of your screen.



In the board edition screen your board is a little faded and each column has a set of four icons that can be used to introduce changes to this particular column (or swimlane):
- the **pencil icon** allows you to edit the column or swimlane,
- the **split "fork" icon** is used to divide a particular column into two separate ones. There may be a situation when one group of items has to be further divided into two more, like TO DO items into TO DO (this week) and TO DO (next week), etc. You can divide and subdivide the divisions as much as you need,
- the **bin icon** is used to delete a particular column or swimlane when you decide it is no longer needed,
- the **gray right / left arrow icons** – these icons allow for changing the location of a particular column or swimlane on the board. Click on the arrow icon for the column / swimlane to swap places with the one indicated by the arrow's point.

To add a column or a swimlane just click on the big green icon visible on the right and at the bottom of the board respectively.

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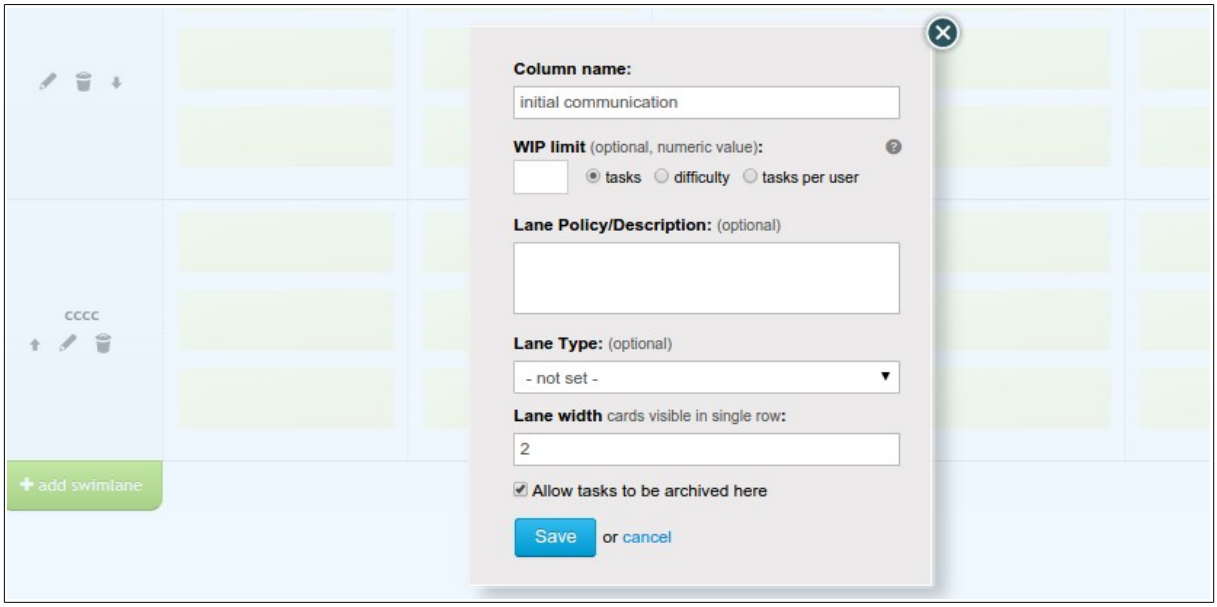
The Work In Progress limits are designed to reduce multi-tasking and maximize throughput. **To add work in progress limits per column** go to "Settings", then "Workflow editor" and click the pencil icon to edit the limit. Fill the work in progress limit in "Task count limit" field and save.



To add a Kanban policy, while on the board, please go to "Settings → Board editor". Click on edit (pencil icon) next to the column (or swimlane) name where you want to add the policy.

Then fill the Lane (or Swimlane) Policy / Description field. The policy will be available for every Kanban board user when hovering over the blue info icon on the board.

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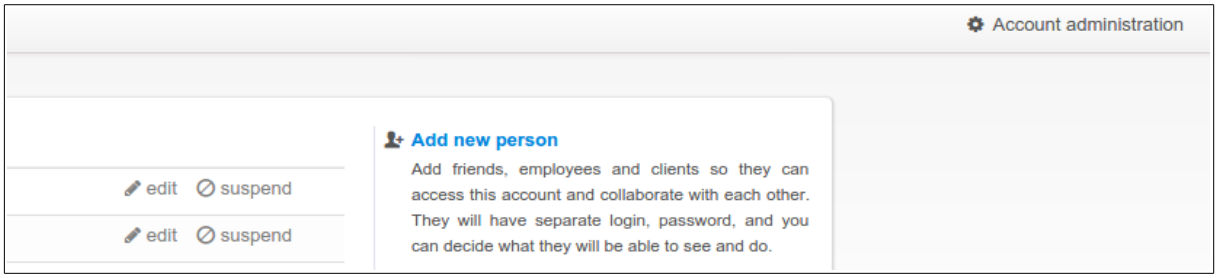
3. Adding people to your account

Working together is fun! Thanks to KanbanTool it is also easy. Start collaborating by adding new users to your account. Click “People” icon, visible in the top left the menu.


Account administration
Add new person
Add friends, employees and clients so they can access this account and collaborate with each other. They will have separate login, password, and you can decide what they will be able to see and do.
edit
suspend
edit
suspend

In the screen that follows, you are able to set an entire sub-account for any person you need to take part in using your Kanban board.
There, you can also assign privileges that determine how much change the particular person can introduce onto the boards:
- If you want this person to view all boards and folders, select "**Account owner**" privileges. These privileges allow to see and do everything with and within your account.
- If you'd like for a user to be able to see, manage and create new items within the account, assign them “**Account administrator**” privileges. They will not be able to edit any account settings.
- When you want a user to only access the boards that were shared with them and create and manage new ones, give them “**Project Manager**” privileges. Project Managers will be able to invite new people, but will not be able to edit the People section to edit users' options.

However, if you only want a user to have access to one selected board or a folder, after inviting this person, please go to "share" option and select this person to give access. When you fill the pop-up form, the person will receive an email with their username, password and URL to access your account.

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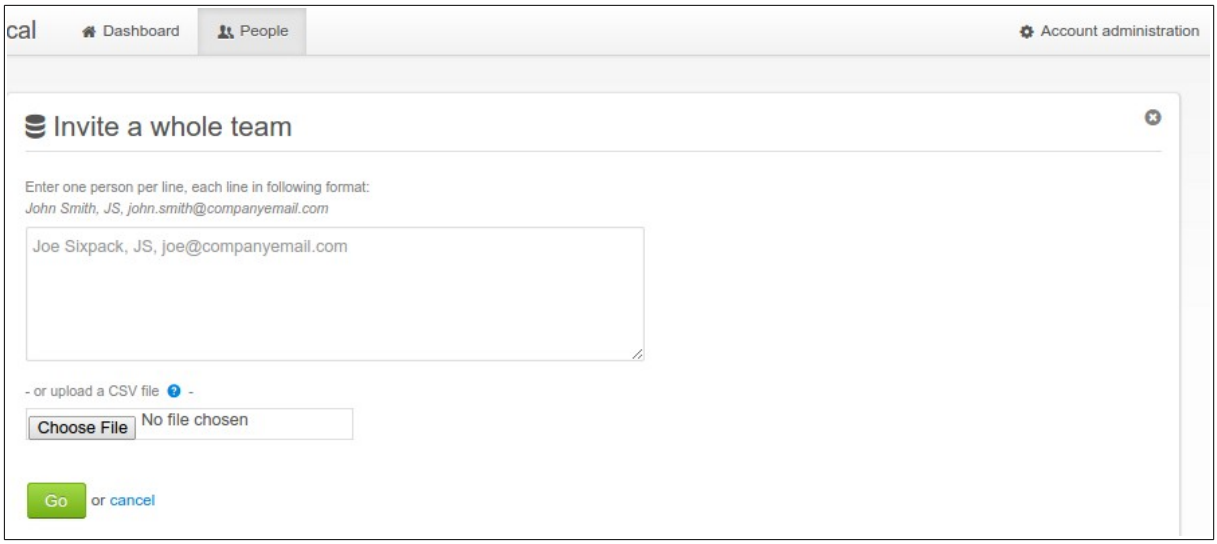
If you have a CSV file with people you would like to add to your account, you can import them at once instead of adding each person individually. Go to People → Invite a Whole Team option.



4. Sharing boards and folders with your team

While on the Dashboard, click the "share" option next to your Kanban board's or folder's name.

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Then, click "Add new person" and fill the form. Choose "full access" option to allow invited person to create, modify, move and delete tasks. This person will have access to this board or folder only. In “custom” access option you can specify what exactly a particular person is allowed to do on the board. A “read only” access will only allow to view the board, no modifications of any kind allowed.

5. Using your Kanban board

With your board edited to suit the needs of your team or project, you can now begin adding tasks. To add a task to a particular column either just double click on the empty space within the column or click the green “add task” icon. To do I faster, you can also use a keyboard shortcut “N” (adds a task to the leftmost column).

A card edition screen will appear. Here you are able to:
- name the task;
- write a task description, or simply copy & paste any external information about it;
- change the type of the card – types are usually connected to colors and will be discussed in sections that follow;
- set the priority of the task;
- assign the task to a particular person within the team, with whom you have shared your board;
- set a due date for the task's completion;
- add tags, to help in managing and searching tasks via the search engine visible in the top right corner of your board;

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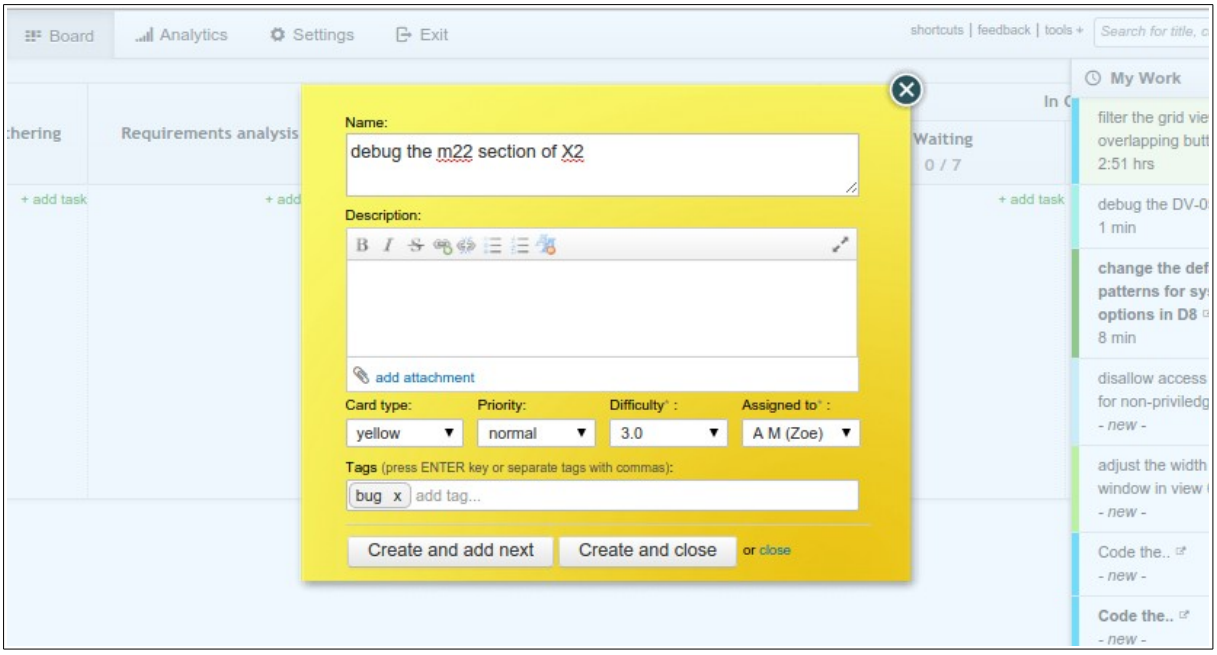
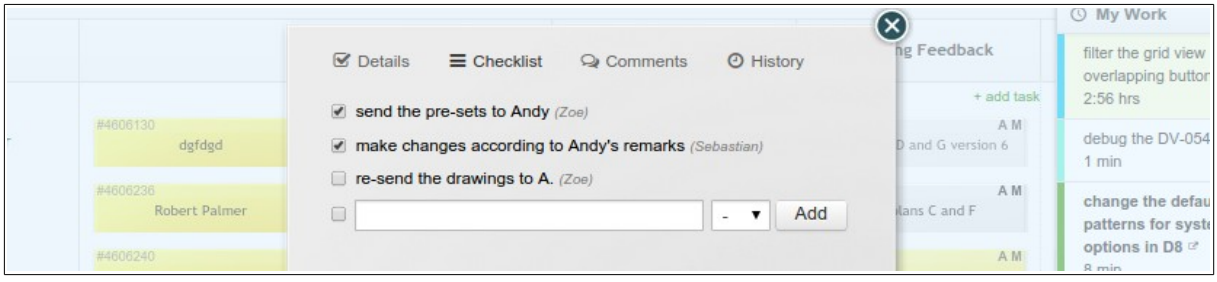


Note: Please note this is a standard layout of a card. Adding further functions to the cards will be described in the next sections.

When you access your new card you will notice a set of new options visible in the headline.

Checklist - allows you to make a list of things, that a particular task will consist of, so that your team may tick off as they proceed through the task.



Comments - here any user with access to the board may leave his notes and comments, concerning a particular task. Each comment already comes with the name of the user that wrote it, as well as a date, so it is not necessary to sign the commentary.

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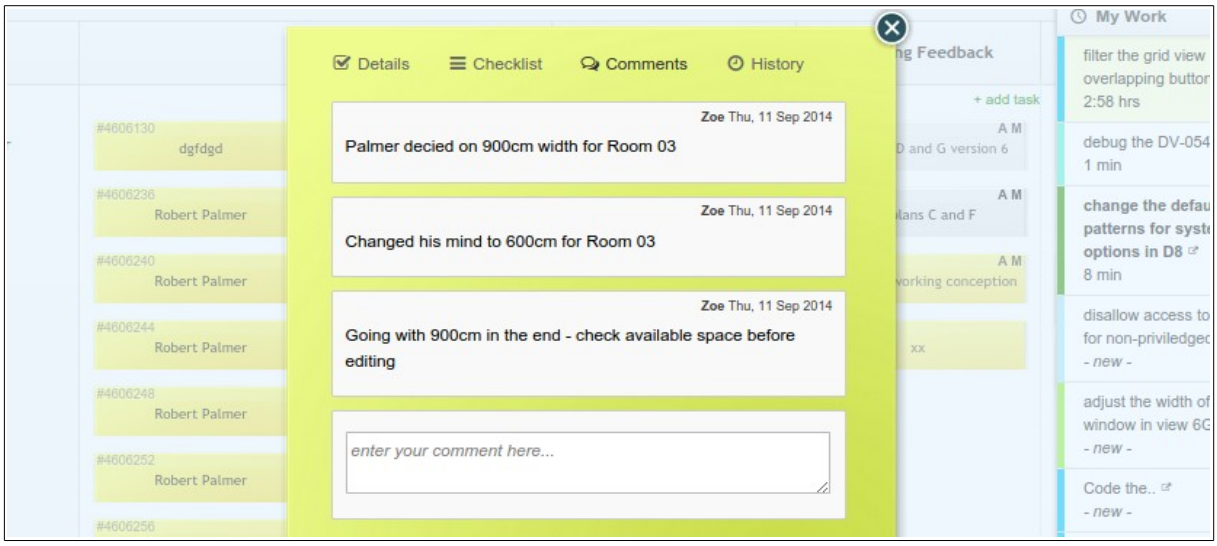
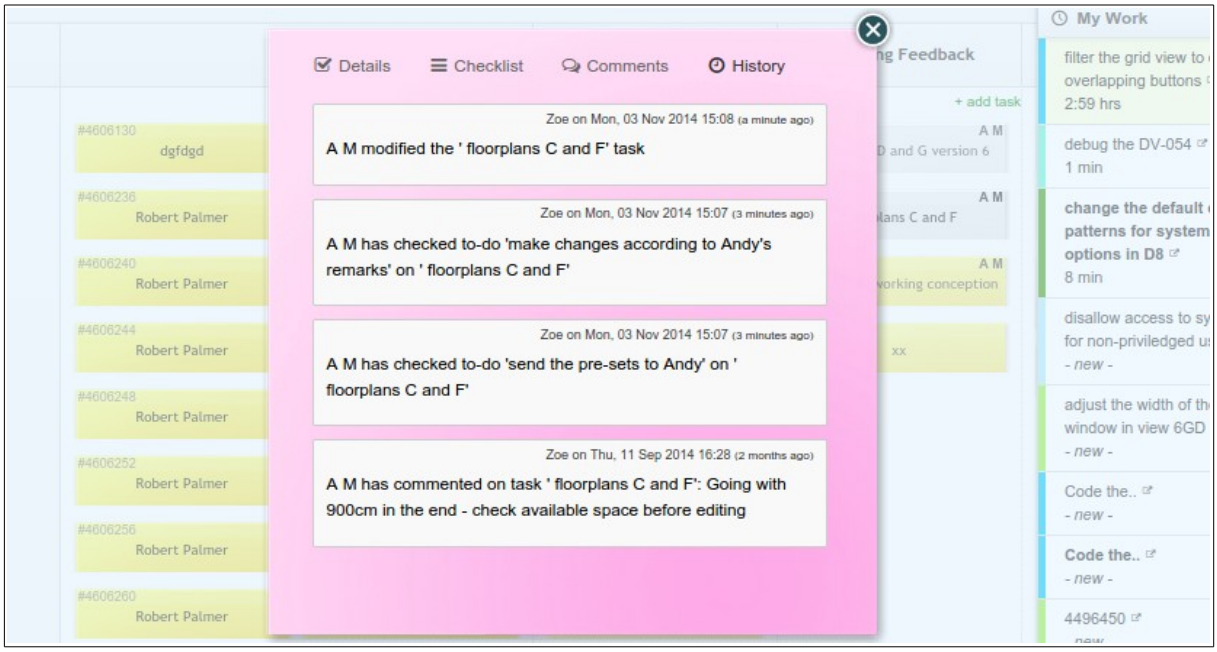

Details
Checklist
Comments
History
Zoe Thu, 11 Sep 2014
Palmer decied on 900cm width for Room 03
Zoe Thu, 11 Sep 2014
Changed his mind to 600cm for Room 03
Zoe Thu, 11 Sep 2014
Going with 900cm in the end - check available space before editing
enter your comment here...
My Work

History - here you can see a complete history of a card, from its creation to the latest changes. All changes are accompanied by their date and time.


Details
Checklist
Comments
History
Zoe on Mon, 03 Nov 2014 15:08 (a minute ago)
A M modified the ' floorplans C and F' task
Zoe on Mon, 03 Nov 2014 15:07 (3 minutes ago)
A M has checked to-do 'make changes according to Andy's remarks' on ' floorplans C and F'
Zoe on Mon, 03 Nov 2014 15:07 (3 minutes ago)
A M has checked to-do 'send the pre-sets to Andy' on ' floorplans C and F'
Zoe on Thu, 11 Sep 2014 16:28 (2 months ago)
A M has commented on task ' floorplans C and F': Going with 900cm in the end - check available space before editing
My Work

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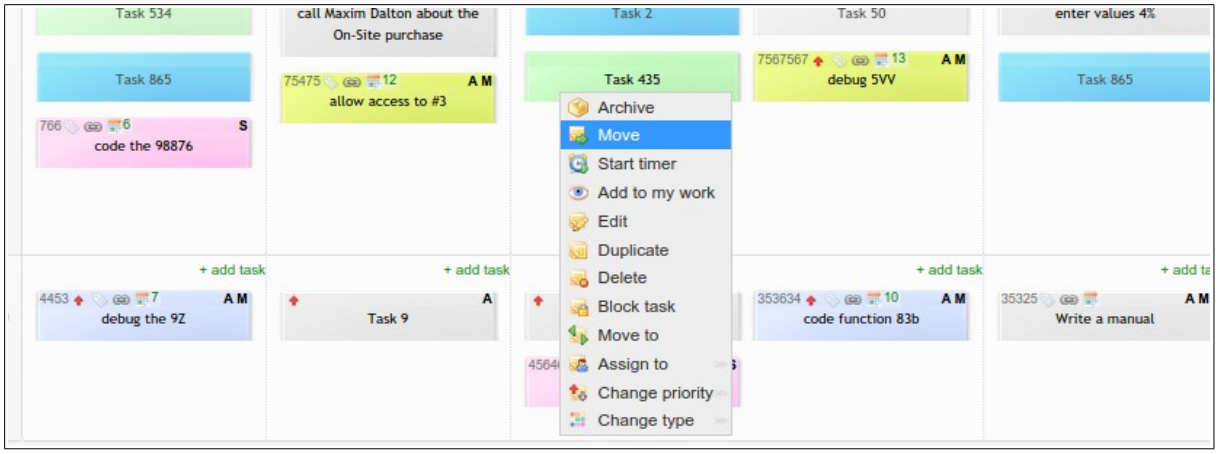
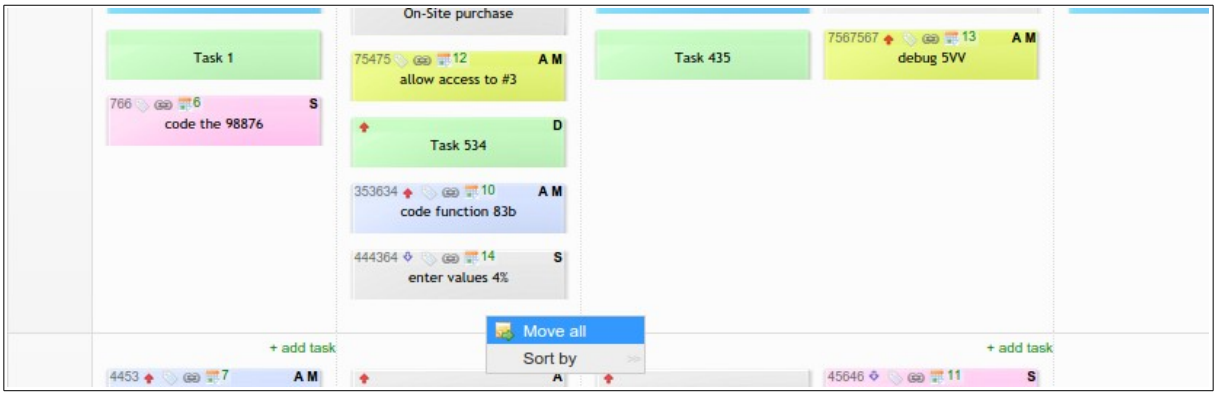
6. Moving around the Kanban board

Kanban boards are all about simplicity. The aim of using a Kanban board is to see the card progress through the various stages of the project until it reaches the end (i.e. completion) at the far right end of the board.

To move a card around the board just use the standard *Drag & Drop* method. You can also use a card dropdown menu. Just right-click on the card and select "Move". This action will progress the card to the next column to the right.



If you have more tasks that need to be moved from one column to another, right-click in any empty space within a column and select "Move all".



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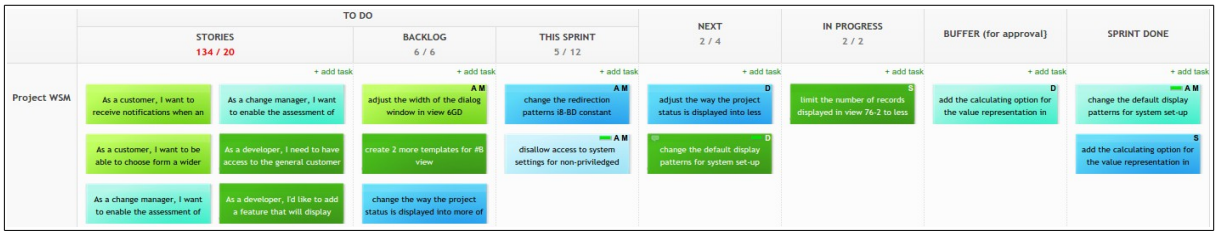
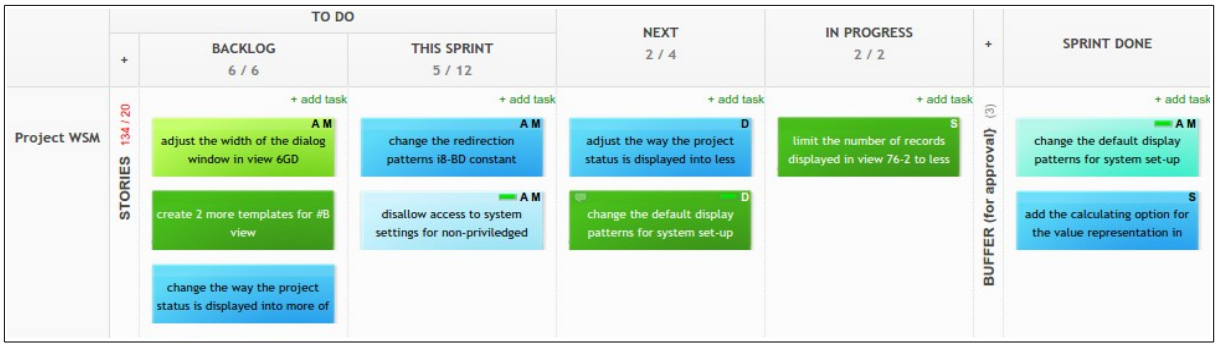
7. Collapsing columns and swimlanes

Are you working with a very large board? You can always collapse or expand column by clicking on it's label (when expanded) or at the + sign (when collapsed). For your convenience, you can still move cards to collapsed columns, just drag a card over and hold above one, until it expands.


TO DO
STORIES
134 / 20
BACKLOG
6 / 6
THIS SPRINT
5 / 12
NEXT
2 / 4
IN PROGRESS
2 / 2
BUFFER (for approval)
SPRINT DONE
Project WSM
+ add task
As a customer, I want to receive notifications when an
As a change manager, I want to enable the assessment of
adjust the width of the dialog window in view 6GD
change the redirection patterns i8-BD constant
adjust the way the project status is displayed into less
limit the number of records displayed in view 76-2 to less
add the calculating option for the value representation in
change the default display patterns for system set-up
As a customer, I want to be able to choose form a wider
As a developer, I need to have access to the general customer
create 2 more templates for #B view
disallow access to system settings for non-priviledged
change the default display patterns for system set-up
add the calculating option for the value representation in
As a change manager, I want to enable the assessment of
As a developer, I'd like to add a feature that will display
change the way the project status is displayed into more of


TO DO
BACKLOG
6 / 6
THIS SPRINT
5 / 12
NEXT
2 / 4
IN PROGRESS
2 / 2
SPRINT DONE
Project WSM
STORIES 134 / 20
BUFFER (for approval) (3)
+ add task
adjust the width of the dialog window in view 6GD
change the redirection patterns i8-BD constant
adjust the way the project status is displayed into less
limit the number of records displayed in view 76-2 to less
change the default display patterns for system set-up
create 2 more templates for #B view
disallow access to system settings for non-priviledged
change the default display patterns for system set-up
add the calculating option for the value representation in
change the way the project status is displayed into more of

The top graphic shows a Kanban board with all columns expanded, while on the lower one there are two collapsed columns (replaced with a + and with their names written sideways).

8. Customizing the card template

It's very easy to customize Kanban cards layout to suit your needs. You can edit your Kanban card template in "Settings → Card template". Here, you are able to add more options to your cards:

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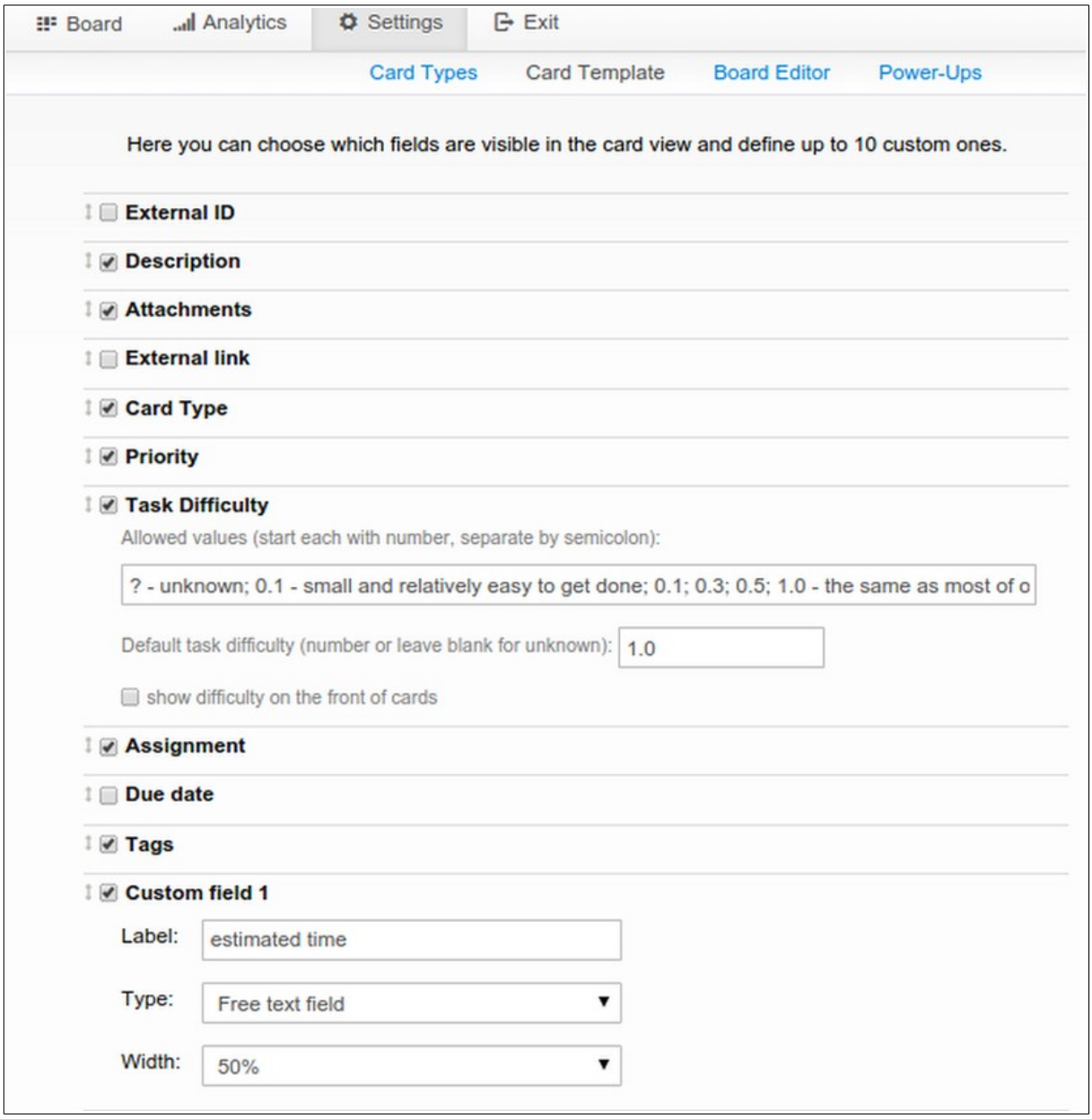

- External ID – you can add an external ID to your cards. It's possible to make it editable, visible on the front of cards, set sequential numbers (this will make the number unique across all your boards) and choose an option to auto generate them for new cards. Editable external ID is useful for fast searching and keeping cards in groups.

- External link – allows you to attach external links to your cards - very useful when information vital for completion of the task is found on a website.

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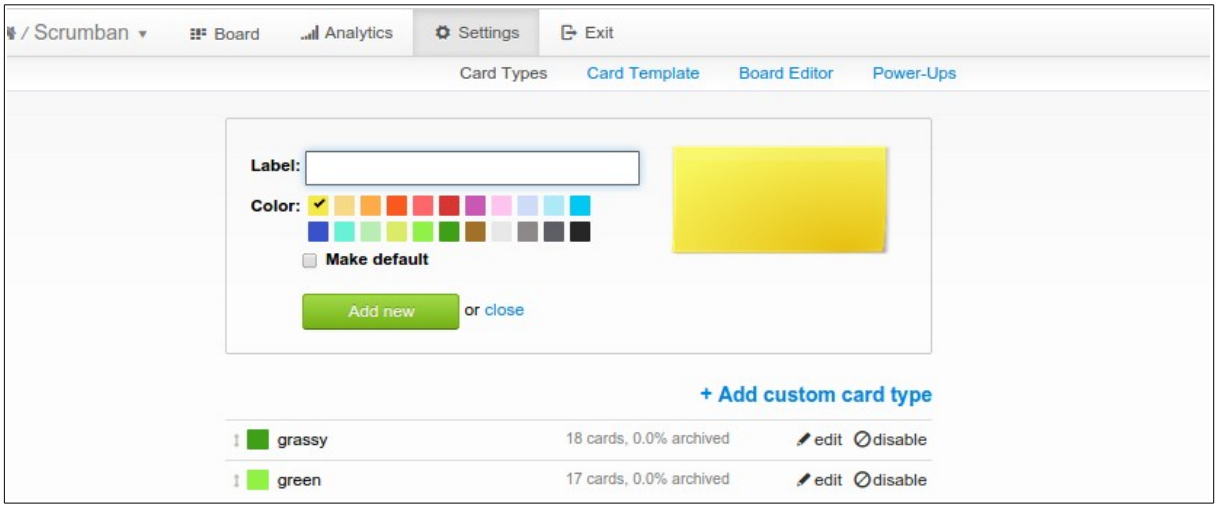
- Task difficulty – allows you to rank the difficulty of a task, indicating how much time and effort will be required to complete it.
- Custom fields – that's the part allowing you to create up to ten custom fields, that will appear on each of the board's cards. They can contain either free text fields, numbers, dropdown menus with options, an external link or date pickers. You can also set how much space a particular custom field will take on the card edition screen (width).

9. Defining Card Types

In Settings → Card Types menu you are able to **assign colors to different kinds of cards**. Sky is the limit here, as you can assign colors to particular users, or according to the urgency of tasks, or simply by the nature of the task at hand. Actually, the more, the merrier, and since it is based on simple connotations, it should be fairly easy to follow for all team members, new or experienced. Just remember not to change the meaning of the colors too often as it may cause confusion.



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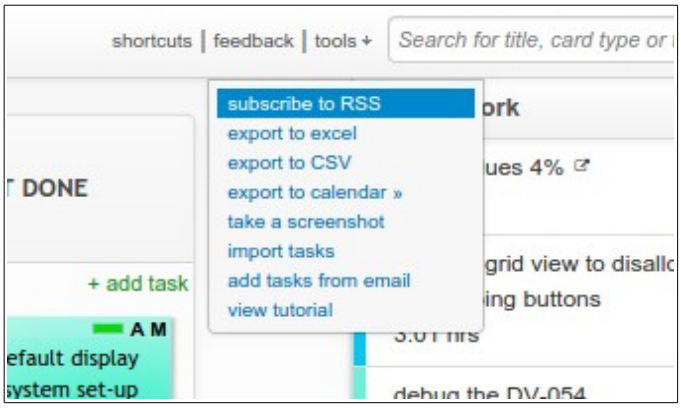
10. Notifications

There are 2 situations when a user gets notifications by an email:

- when this user is assigned to a task,
- when someone adds a comment to a task and selects this user to be notified about it.

If you want to be informed about the status changes of all tasks on a board, you need to subscribe to RSS feeds.
You can easily generate a link to RSS. While on the Kanban board, please go to "Tools → subscribe to RSS".



The correct url for RSS feeds is generated for each user individually for security reasons to protect access to your cards, boards and projects via RSS. Your url should include "surl=" + a number.

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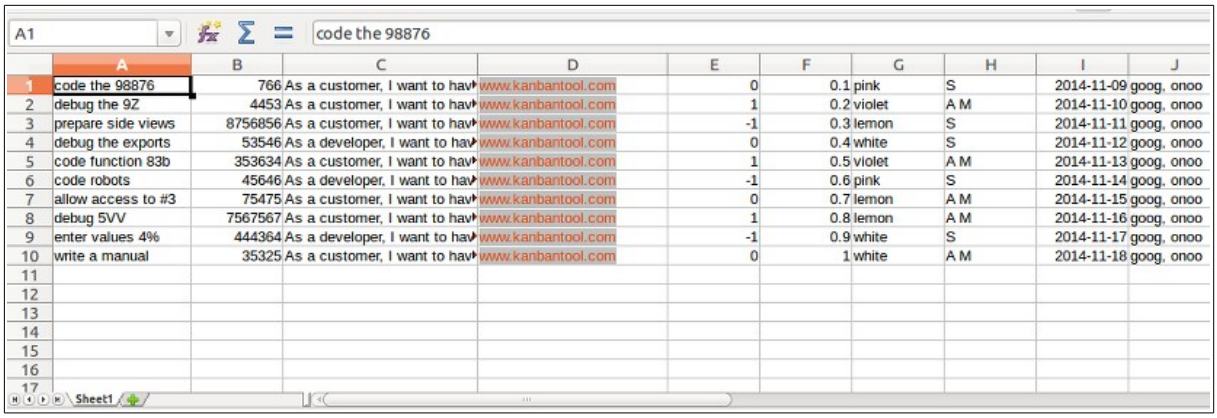
11. Importing tasks form Excel or CSV

KanbanTool allows to import Kanban cards to your board. To do it right, follow the steps below:



A1 code the 98876

	A	B	C	D	E	F	G	H	I	J
1	code the 98876	766	As a customer, I want to hav	www.kanbantool.com	0	0.1	pink	S	2014-11-09	goog, onoo
2	debug the 9Z	4453	As a customer, I want to hav	www.kanbantool.com	1	0.2	violet	A M	2014-11-10	goog, onoo
3	prepare side views	8756856	As a customer, I want to hav	www.kanbantool.com	-1	0.3	lemon	S	2014-11-11	goog, onoo
4	debug the exports	53546	As a developer, I want to hav	www.kanbantool.com	0	0.4	white	S	2014-11-12	goog, onoo
5	code function 83b	353634	As a customer, I want to hav	www.kanbantool.com	1	0.5	violet	A M	2014-11-13	goog, onoo
6	code robots	45646	As a developer, I want to hav	www.kanbantool.com	-1	0.6	pink	S	2014-11-14	goog, onoo
7	allow access to #3	75475	As a customer, I want to hav	www.kanbantool.com	0	0.7	lemon	A M	2014-11-15	goog, onoo
8	debug 5VV	7567567	As a customer, I want to hav	www.kanbantool.com	1	0.8	lemon	A M	2014-11-16	goog, onoo
9	enter values 4%	444364	As a developer, I want to hav	www.kanbantool.com	-1	0.9	white	S	2014-11-17	goog, onoo
10	write a manual	35325	As a customer, I want to hav	www.kanbantool.com	0	1	white	A M	2014-11-18	goog, onoo
11										
12										
13										
14										
15										
16										
17										

Sheet1

- Prepare you excel or CSV file. Fill it with information useful to you (you can fill as little as the first column of the file alone, if that's all you need). When creating the file please remember to use only card types and user initials **that are set for your board**, otherwise the system will not be able to recognize them.
You will need to change the priority from “high”, “low”, “normal” to numerical values. Priority "0” means normal priority, "1" is high and "-1" is low. Also, you will have to remove the heading from the csv file before importing, so that it doesn't get imported too (the file has to contain only the information that you want to import).
- To make sure that your file will be recognized by KanbanTool it needs to be encoded in a UTF-8 format – instructions on how to ensure It are provided here. Alternatively, you can copy the information from your csv file and paste it as text in the text field provided in section 4 of the import (discussed below).

- Once your import file is ready, you need to set KanbanTool import options:
- In board view, go to Tools → Import tasks;
- Section 1. choose into what column / swimlane you'd like the tasks to be imported;

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- Section 2. choose a separator for the information (a “comma” is the default sign for csv files);
- Section 3. select which columns of your csv file represent what Task Card information (written in the same order that they appear in the file). If you only wrote data in one column of your csv, select just one field, if you wrote more – make choices for the same number of fields that there are data columns in the csv;
- Section 4. here you can either write your tasks (One task per line, separated by the separator of your choice [in section 2], data between separations is a different row format).
- Section 5. you can validate if the way you've given information is correct and the import is possible, or not, and if not – you'll be told what the problem is. After this, you're ready to hit Import Tasks Now to have your new tasks on the board.

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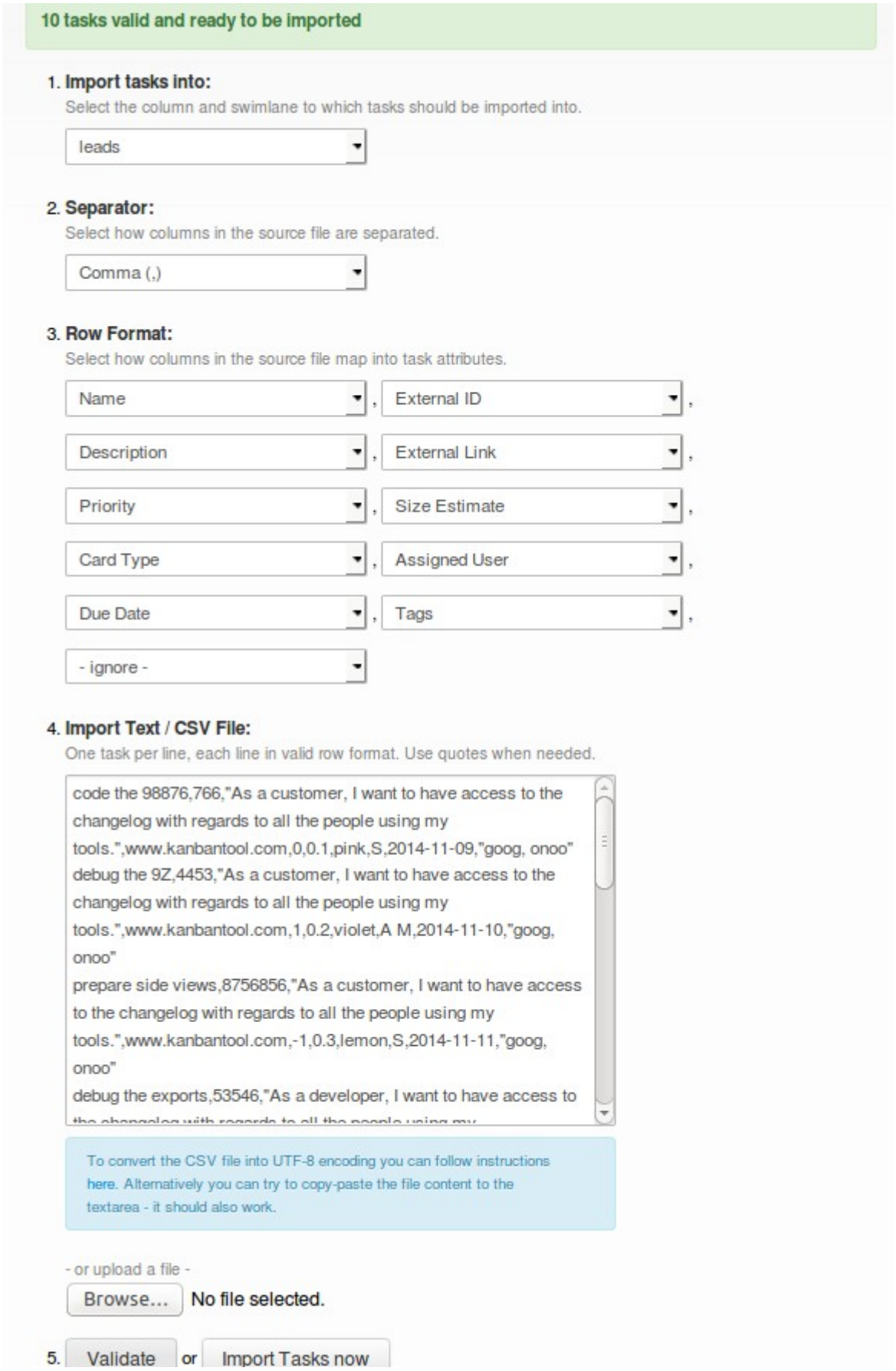
10 tasks valid and ready to be imported
1. Import tasks into:
Select the column and swimlane to which tasks should be imported into.
leads
2. Separator:
Select how columns in the source file are separated.
Comma (,)
3. Row Format:
Select how columns in the source file map into task attributes.
Name , External ID ,
Description , External Link ,
Priority , Size Estimate ,
Card Type , Assigned User ,
Due Date , Tags ,
- ignore -
4. Import Text / CSV File:
One task per line, each line in valid row format. Use quotes when needed.
code the 98876,766,"As a customer, I want to have access to the changelog with regards to all the people using my tools.",www.kanbantool.com,0,0.1,pink,S,2014-11-09,"goog, onoo"
debug the 9Z,4453,"As a customer, I want to have access to the changelog with regards to all the people using my tools.",www.kanbantool.com,1,0.2,violet,A M,2014-11-10,"goog, onoo"
prepare side views,8756856,"As a customer, I want to have access to the changelog with regards to all the people using my tools.",www.kanbantool.com,-1,0.3,lemon,S,2014-11-11,"goog, onoo"
debug the exports,53546,"As a developer, I want to have access to
To convert the CSV file into UTF-8 encoding you can follow instructions here. Alternatively you can try to copy-paste the file content to the textarea - it should also work.
- or upload a file -
Browse...
No file selected.
5.
Validate
or
Import Tasks now

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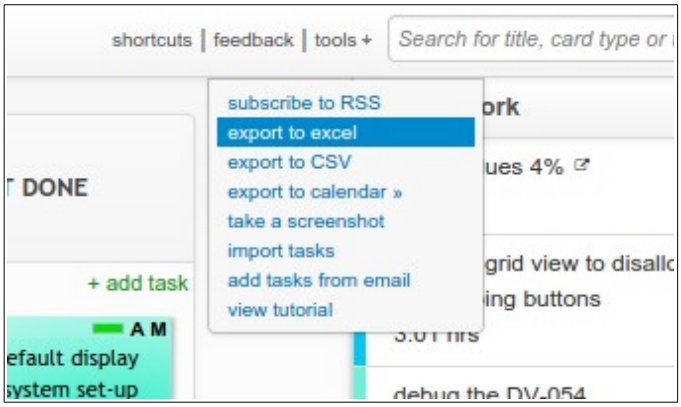
12. Exporting tasks to Excel or CSV

You can export all tasks from your board to Excel or CSV. While on the board, please go to "Tools → Export to excel" or "Export to CSV" option. That's all.

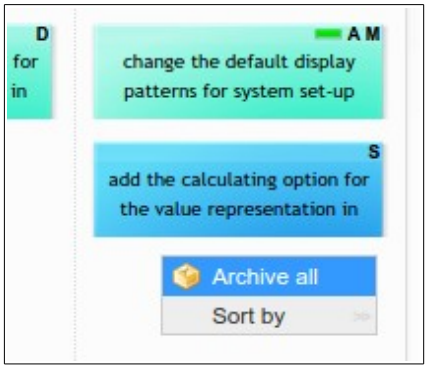


13. Kanban board archive

KanbanTool allows you to archive completed tasks so they don't take up space on the board, but allow you to always be able to go back to them. To archive a task right-click on it and use the dropdown menu to archive it.

By default this option is available only in the last column of your Kanban board, but you can edit options of your columns (Settings → Board Editor → pencil icon under the name of a particular column) to allow tasks to be archived anywhere).

To archive all tasks a column just right-click anywhere in that column and select the "Archive all" option.


change the default display patterns for system set-up
add the calculating option for the value representation in
Archive all
Sort by

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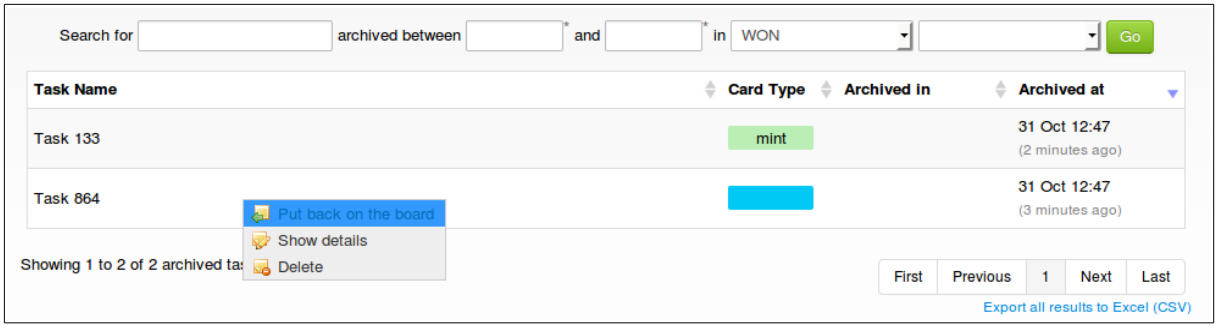
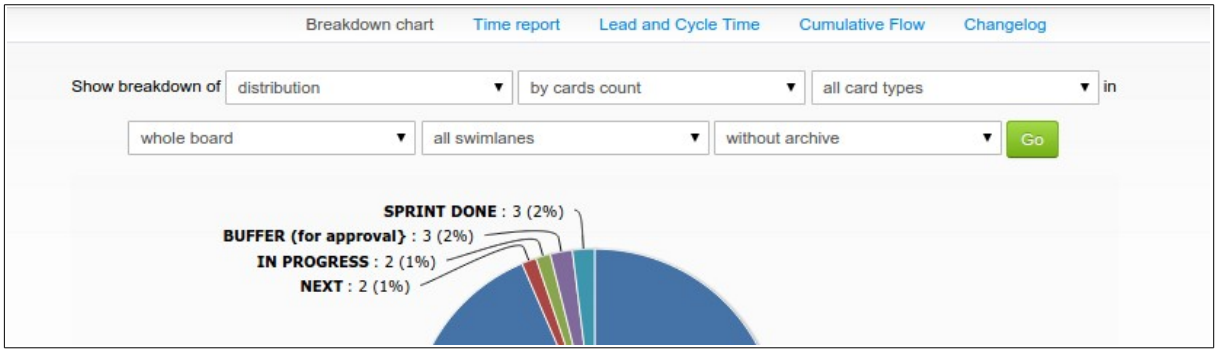
What if you wanted to **put a task from the archive back on the board**? Please go to the „+ X archived tasks" tab at the top of a column, and then right-click on the item that you want to put back on the Kanban board, and simply select „Put back on the board".



14. KanbanTool Analytics

KanbanTool provides advanced Kanban analytics and metrics, including: a Cumulative Flow diagram, Lead & Cycle Time diagram, Breakdown charts an a Time report.

The Breakdown chart allows you to generate various reports about the current status of your board. Choose what information interests you and hit the green „Go" button to see the results in a pie chart.



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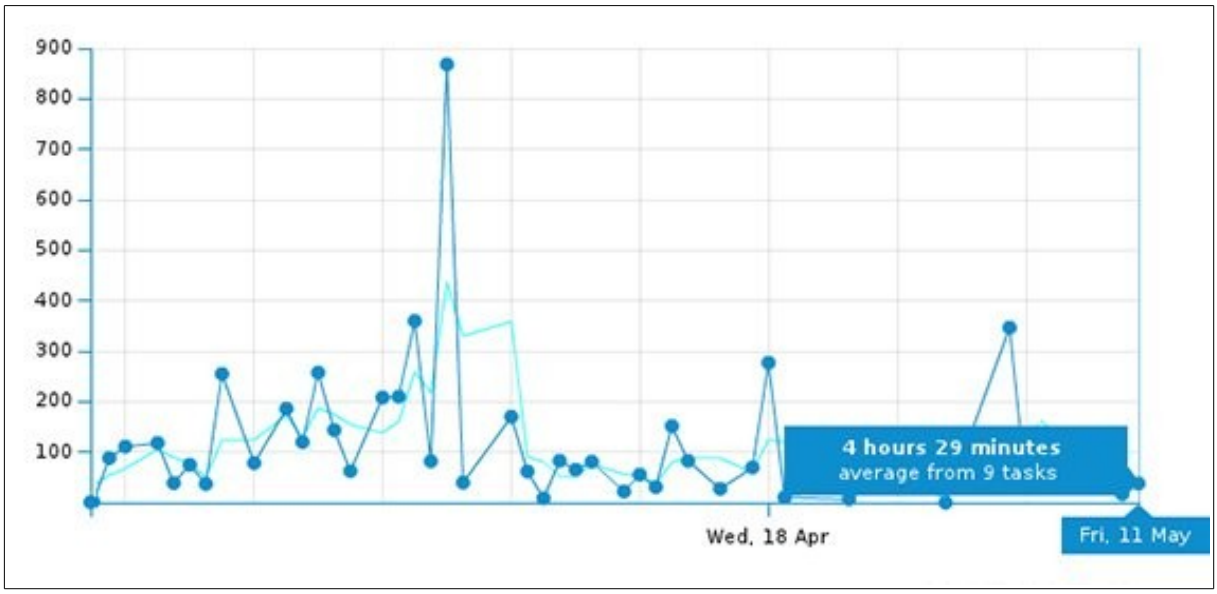
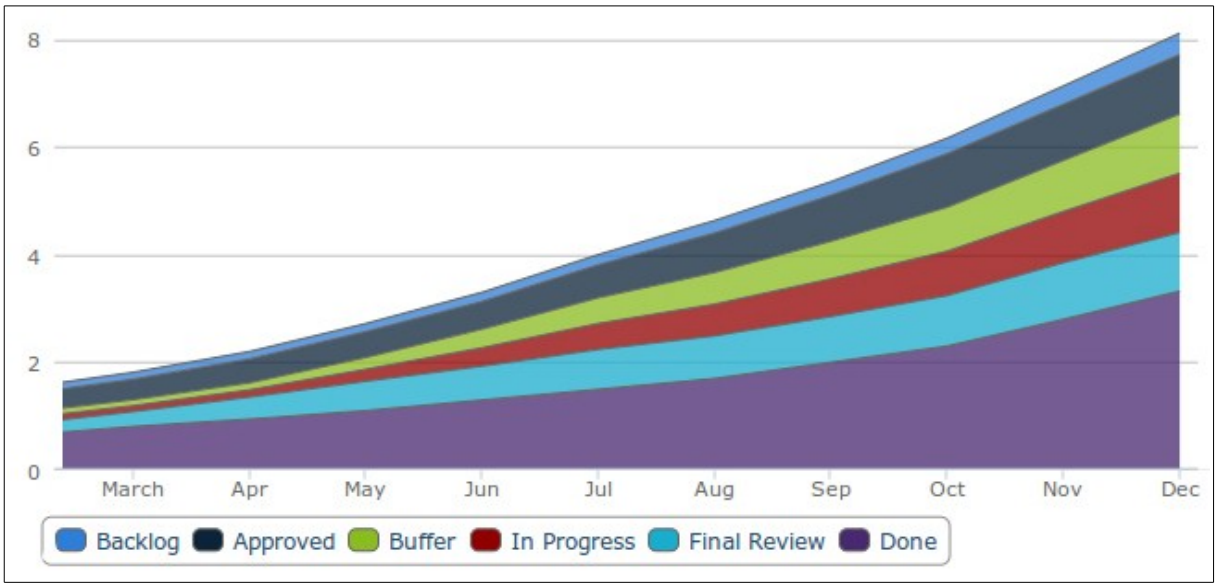
The Lead and Cycle Time diagram shows the average time it takes tasks to get from a specified start point to a specified end state. It is a powerful metric which can be used to track the delay between the initiation and execution of a process, which is a holistic way to measure team performance.



The Cumulative Flow diagram (CFD) shows a detailed picture of your entire process and enables you to track items by state. The horizontal x-axis in the CFD stands for time, and the vertical y-axis indicates the number of tasks. Each colored area of the chart represents the amount of work for each stage of your process at a given time. CFD can be used to identify bottlenecks and team velocity.



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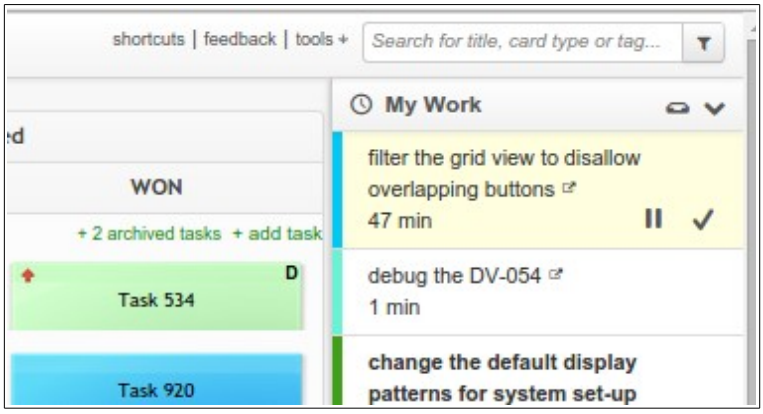
15. Time Tracking and Time Report

Kanban Tool's seamless Time Tracking allows you to measure exactly how long different tasks take. It's seamless, because there is no extra clicking necessary for it to start tracking what you're doing. Simply by dragging a task into an “in progress” type of column, the timer switches on and your work is being measured.

- How to get it working -

To be able to benefit from this powerful feature, you need to be on an Enterprise Pricing plan of KanbanTool. Once you are, then simply edit the column types in “Settings → Board editor”. There are three possible column types, and they will trigger different actions:

- Queue/Waiting - here the timer pauses;
- In progress - the timer starts;
- Done - the timer stops and the task is removed from the list of timers.


shortcuts | feedback | tools +
Search for title, card type or tag...
My Work
WON
+ 2 archived tasks + add task
Task 534
Task 920
filter the grid view to disallow overlapping buttons
47 min
debug the DV-054
1 min
change the default display patterns for system set-up

- The Time Report -

Wondering what your team is doing? With insightful time reports, you always know how much time your team spends on any activity. To get an overview of how your team spends time, select the **Summary report**. On the bar graph you will see the total time spent working each day.

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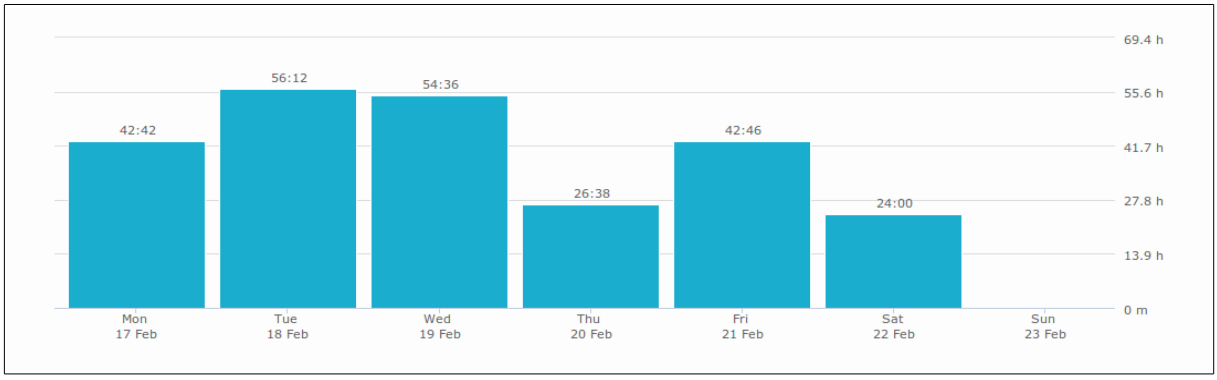
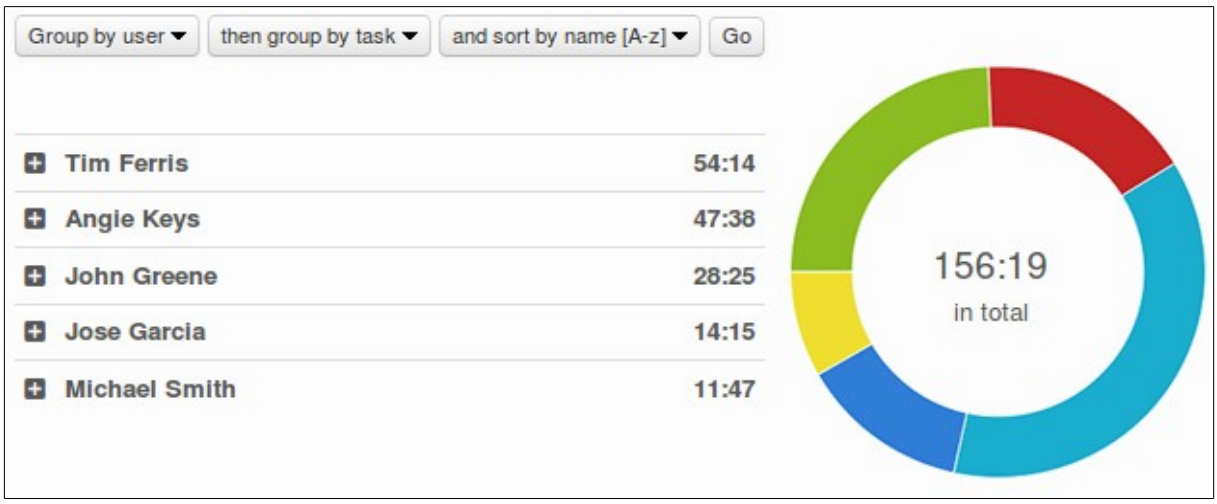
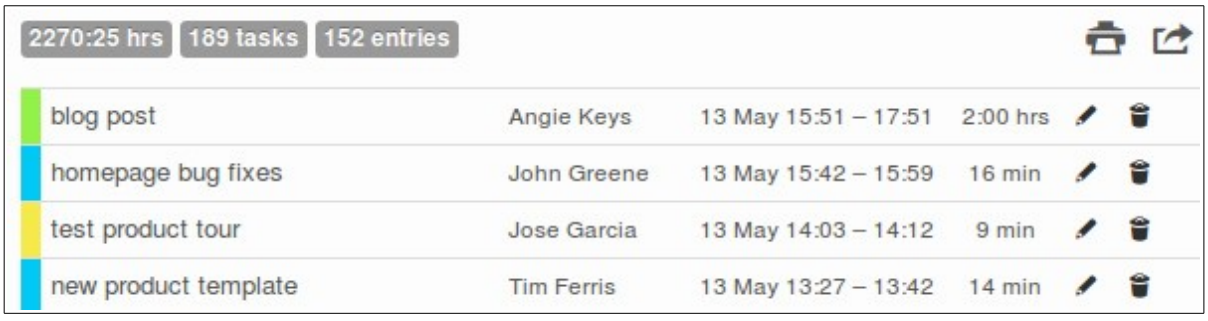


A more detailed breakdown is also available, allowing you to track each team member's performance and logged hours.



The **Detailed report** shows a specific list of all timings. It displays a sum of the time spent, the number of tasks and the total number of entries. Every time you start and pause timers, a new entry is created here. Both account administrators and regular users can modify and remove entries by clicking on the icons to the right of each row. Regular users can only edit and remove their own entries.


2270:25 hrs
189 tasks
152 entries
blog post Angie Keys 13 May 15:51 – 17:51 2:00 hrs
homepage bug fixes John Greene 13 May 15:42 – 15:59 16 min
test product tour Jose Garcia 13 May 14:03 – 14:12 9 min
new product template Tim Ferris 13 May 13:27 – 13:42 14 min

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You can also filter all reports by: boards, time interval, users, task types, swimlanes and tags.

Furthermore, you can export your reports to PDF file and print them out or simply save them as a CSV file.

16. My Work widget

My Work widget is what allows you to display your upcoming tasks **across multiple boards** in one place. From there you can sort them in accordance to your preferences and postpone by a specific amount of time (hours, days).

To be able to use My Work widget, you need to be on a Pricing Plan that includes Time Tracking (Enterprise or Unlimited).

The widget is displayed on the right-hand side of your Kanban board (in the side panel's portion to do with Time Tracking).

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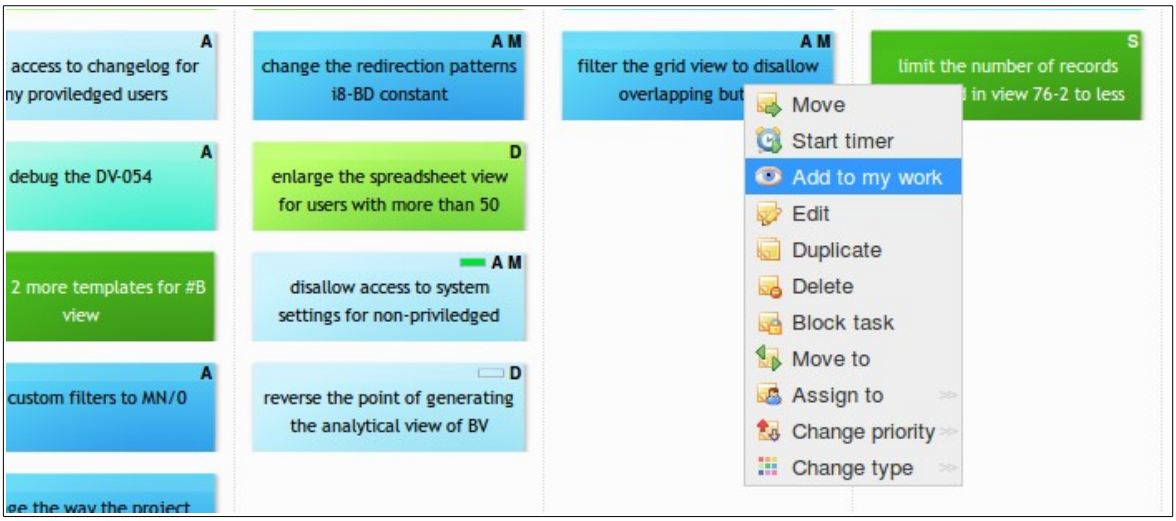
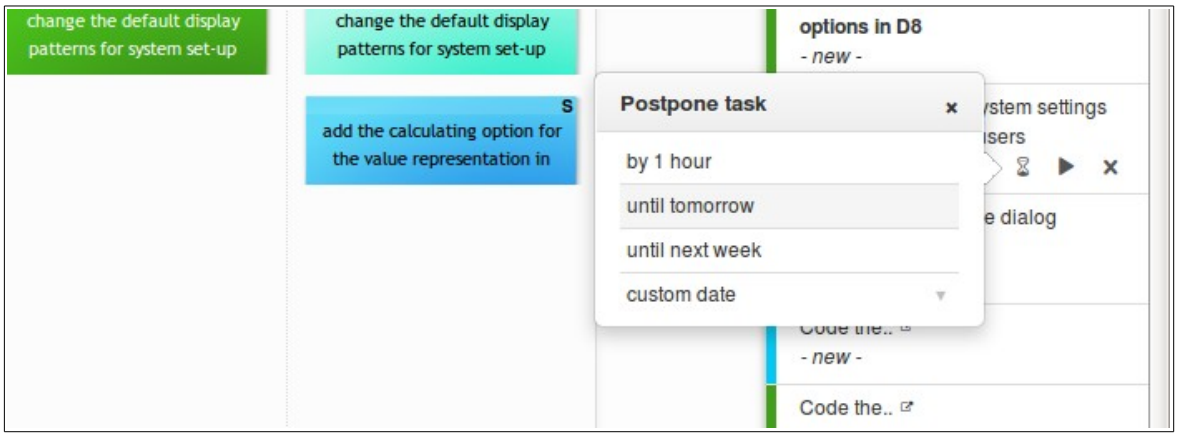
To add tasks to the My Work list, right-click a task and select "Add To My Work". That's all. Also, when someone else assigns a task to you, it will appear on this list. To sort tasks with your own preferences, just use drag and drop.


access to changelog for ny proviledged users
change the redirection patterns i8-BD constant
filter the grid view to disallow overlapping but
limit the number of records in view 76-2 to less
debug the DV-054
enlarge the spreadsheet view for users with more than 50
2 more templates for #B view
disallow access to system settings for non-priviledged
custom filters to MN/0
reverse the point of generating the analytical view of BV
Move
Start timer
Add to my work
Edit
Duplicate
Delete
Block task
Move to
Assign to
Change priority
Change type

To postpone a task, click on the hourglass icon and choose when do you want the task to return onto the list.


change the default display patterns for system set-up
change the default display patterns for system set-up
add the calculating option for the value representation in
options in D8
- new -
Postpone task
by 1 hour
until tomorrow
until next week
custom date
- new -
Code the..

You can view all postponed tasks by clicking the Tray icon, next to the collapse button.

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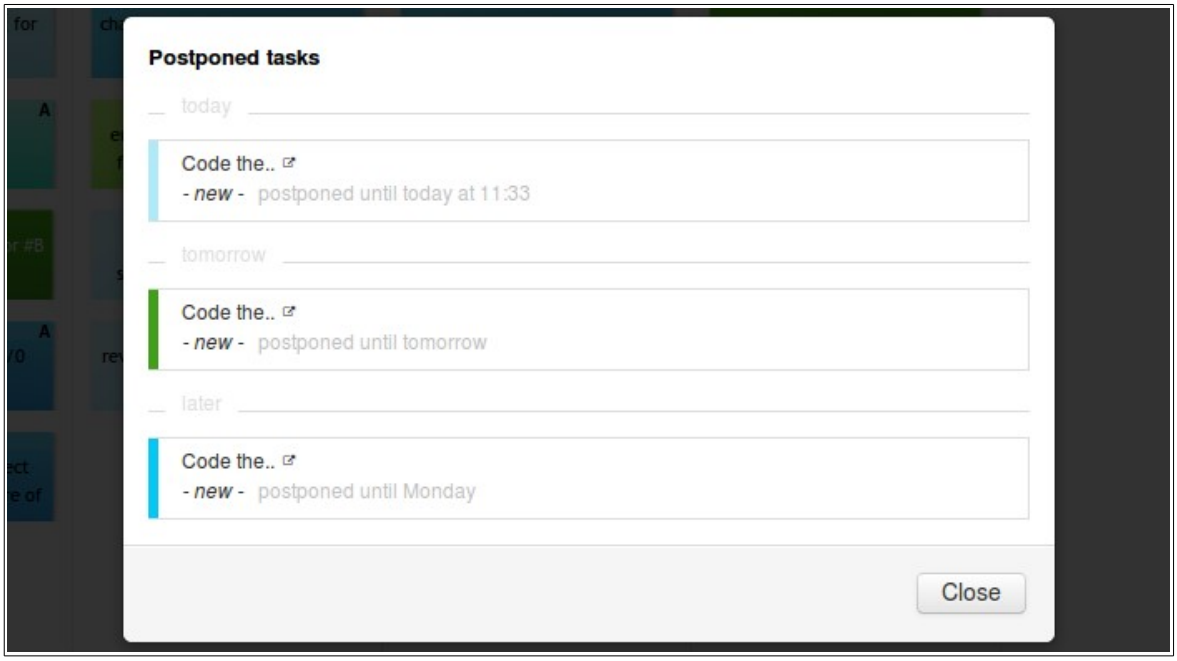
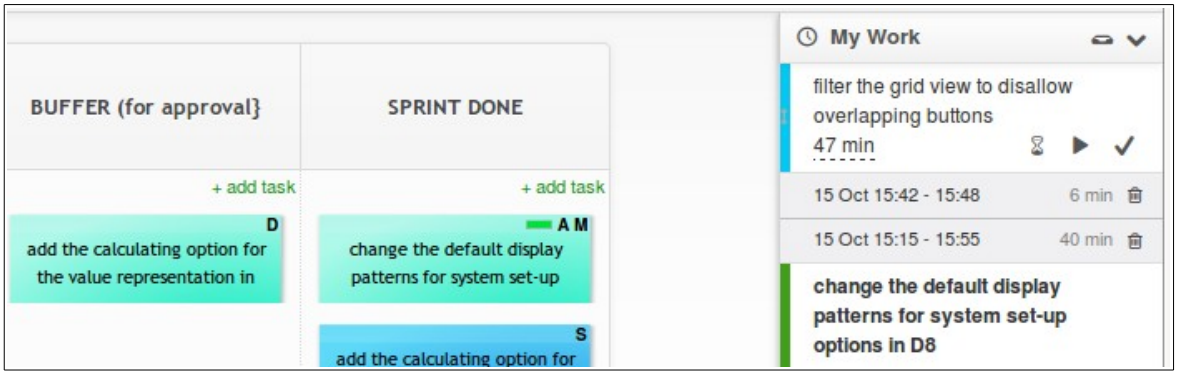


The timer on the task starts just when you move the task into an "In Progress" column, or - if there's more tasks in there already, and you pick one of those - when you right-click on it and select "start timer". Once you've completed a task and moved it to the "Done" column, the timer will stop automatically and the task will then disappear from My Work widget. You can pause at any time.

My Work widget also allows displaying the subtotal amounts of time spent on each individual task. It is accessible by clicking the time passed record. Doing this opens a list of all subtotals. They are also available to view in Time Report - just make sure to open the Detailed Report.


BUFFER (for approval}
SPRINT DONE
+ add task
+ add task
D
add the calculating option for the value representation in
A M
change the default display patterns for system set-up
S
add the calculating option for
My Work
filter the grid view to disallow overlapping buttons
47 min
15 Oct 15:42 - 15:48
6 min
15 Oct 15:15 - 15:55
40 min
change the default display patterns for system set-up options in D8

The name of the task will appear in a **bold** format, when there's been a new comment made in the task and when the task comes back to the list after being postponed. This widget allows displaying tasks from multiple boards - clicking on a

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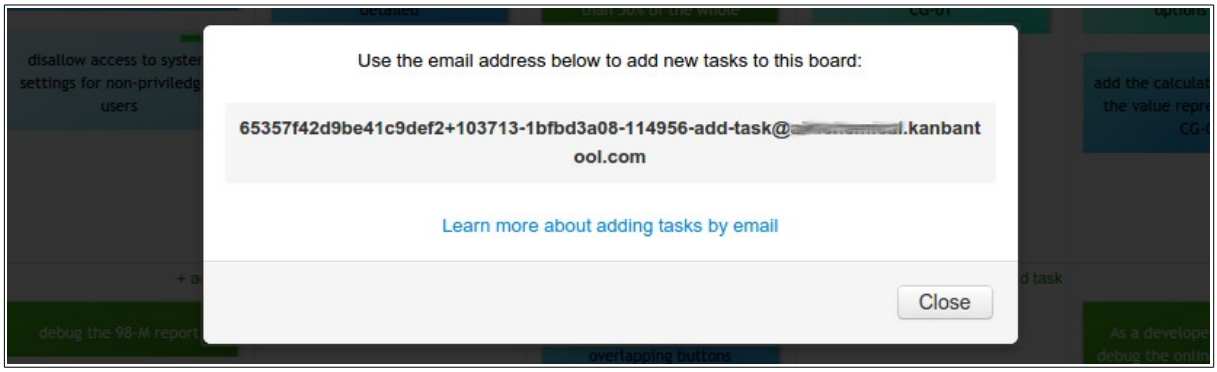
particular task in My Work widget will take you to the Kanban board, that the task is from.

Also, if someone assigns a checklist item to you, a task to which this checklist belongs, will be added to My Work widget - and will appear in bold, so you know there's been new activity.

17. Adding tasks via email

In order to add tasks to your Kanban board via email, you need to generate an email address that will be directly assigned to your Kanban board. To do this, please click on the “Tools” menu in the top right corner of the board view and choose “**add tasks from email**”. You will be moved to the screen with a preset email form that allows you to add tasks via email. Please, carefully copy the email address displayed on top of the form (in the address section). This is a unique address assigned to your Kanban board. Sending emails at this address will add tasks to your board.


Use the email address below to add new tasks to this board:
65357f42d9be41c9def2+103713-1bfbd3a08-114956-add-task@
.kanbantool.com
Learn more about adding tasks by email
Close

The subject of the email is be the name of the task, while the message itself will constitute the description of the task. Filling the subject field is necessary to create the task. Please note that you can write up to 256 signs in task name field.

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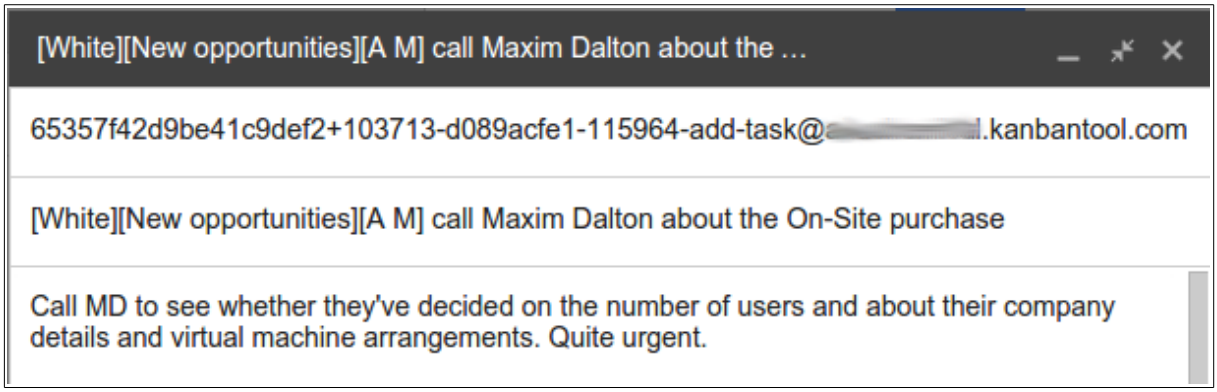
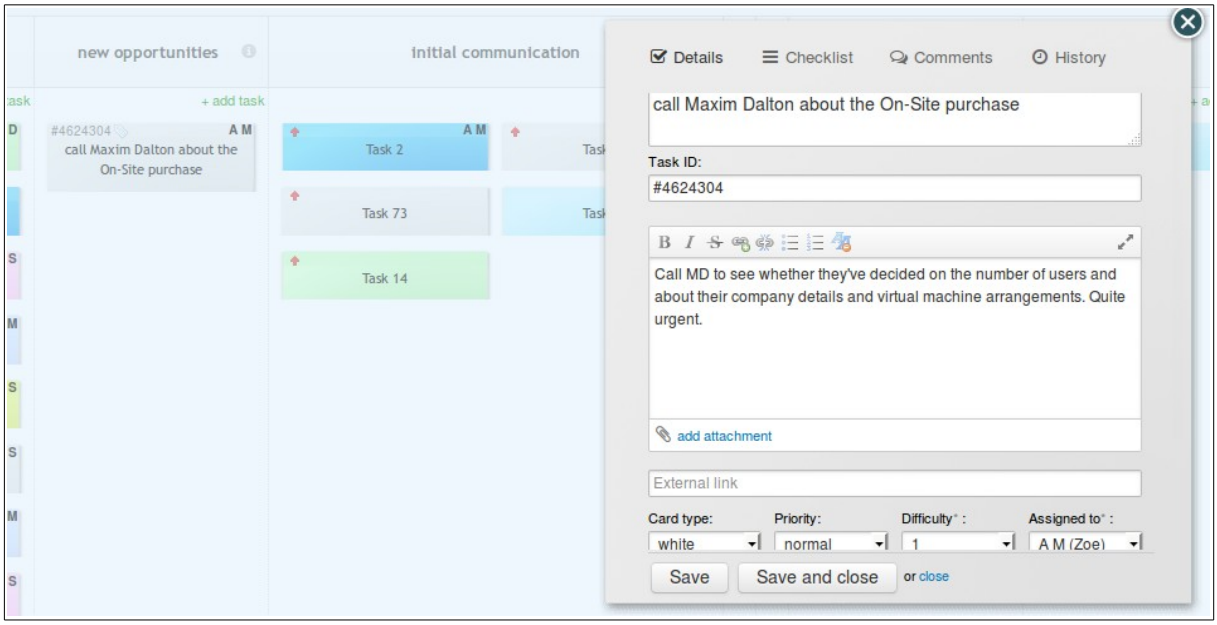
Advanced task adding via email - you can further determine the features of the task by adding tags to the subject of the email. Names of the tags [always written within square brackets and starting with a capital letter] correspond with the names on your Kanban board and determine the location of the new task added to the board. [Tags] should be added before the name of the task, without spaces between them.

The attributes currently supported are:

- column name,
- swimlane name,
- card type,
- assigned user initials,
- priority (high / low).

Any other attribute set in the email subject within square brackets will go to the Tags field. The graphics below show: a properly prepared task-sending email (the top one) and the task received by the board (the bottom one).


[White][New opportunities][A M] call Maxim Dalton about the ...
65357f42d9be41c9def2+103713-d089acfe1-115964-add-task@[redacted].kanbantool.com
[White][New opportunities][A M] call Maxim Dalton about the On-Site purchase
Call MD to see whether they've decided on the number of users and about their company details and virtual machine arrangements. Quite urgent.



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Example 1 (on a basic Kanban board):

[Yellow][To do]Task 1

Subject written like this will assign a yellow card to the „To do" column of the Kanban board with a name „Task 1".

Example 2 (on a more advanced Kanban board):

[Red][Waiting][Marketing][Bill Thompson]Perform A/B tests

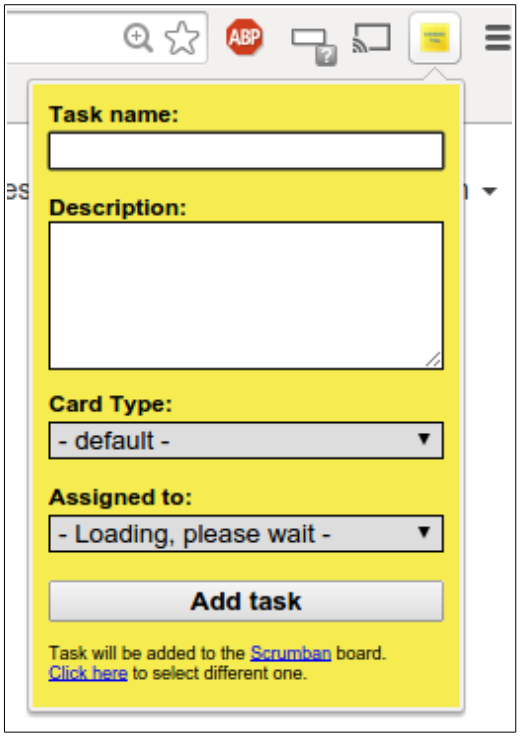
Subject written like this will assign a red card to the „Waiting" column of the „Marketing" swimlane with the name of Bill Thompson and a task name „Perform A/B tests".

18. KanbanTool integration

Kanban Tool offers many useful integration features. One of the most popular is adding tasks via email to your board in KanbanTool (to find out how to do it, please go to next question). We also provide a powerful API to integrate KanbanTool with your systems. You can find more information in our well-documented KanbanTool API section.

"Add task button" Chrome extension for KanbanTool

While on Dashboard go to "My profile" → "API access". Generate your API token and copy it. Then please go to Chrome Web Store and add the "KanbanTool Add task button" extension to Chrome. It appears in the top right corner menu of your browser, with the other extensions. The best way to enable it, is to right-click it, and go to Options. Here is where you can add your domain name (your KanbanTool account name) and where you should paste the API Token.



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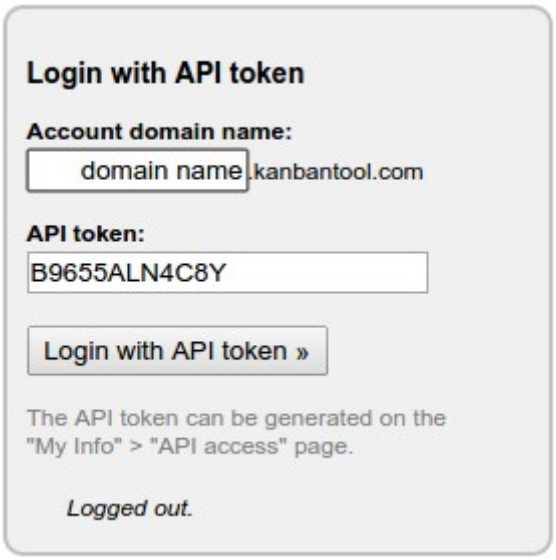

Then you will be taken to Options, where you can decide to which of your Kanban boards you want to be adding tasks via this button. Once you've set everything, you can quickly add new tasks by clicking the KanbanTool button in the browser's top right corner. You can easily change the board that you're adding tasks to by entering the Options menu in the same way as described above.

"Kanbanira" Chrome extension for KanbanTool

Kanbanira connects tasks in KanbanTool with issues in Atlassian JIRA®. It's a simple, but powerful integration allowing you to gain most benefit from both tools. All you need to start, is visit Kanbanira page in Google Web Store and watch a video on how to integrate KanbanTool with Atlassian JIRA® using Kanbanira.

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Zapier and We-Wired Web integration

This is the easiest way to sync Kanban Tool with other web services, that you and your team already use on a daily basis. Zapier hooks Kanban Tool up with over 200 applications.

We-Wired Web is an online service, that allows you to easily create automated tasks for popular web services. All you need to do is choose the online applications, that you like and link them - select a trigger and an action that you want to combine. You can even use multiple triggers and actions per task, as well as location-based triggers defined on maps.

Export tasks to Outlook

To export tasks' names with tasks due dates to Outlook, while in board view please go to the „Tools → export to calendar" and select "Outlook / iCal". Note please, that Outlook should be your default calendar in order for the set-up to work.

Export tasks to Google Calendar

In order for this integration to work, you'll need to have some tasks with due dates, to be exported to Google calendar. To enable "Due date" field on your card: while on board please go to "Settings" → "Card Template" and enable "Due date" field. When you fill the "due date" on your cards, you are ready to export tasks to Google calendar.

To do it, while on the board, please go to "Tools → export to calendar" and "Google". On the Google calendar tab you will see a box: "Do you want to add this calendar?". Click "Yes, add this calendar". And your tasks with due dates should appear in Google calendar.

Attach files from Google Drive, Dropbox, OneDrive or Box

Integration with these file hosting services allows you to attach files from them to your task cards or to place direct external links in cards. Read more in the **Power-Ups Section** of this Manual (page 48).

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Kanban Cast

Kanban Cast is KanbanTool's integration with Chromecast, a Chrome (internet browser) streaming device, that when attached to a tv screen, displays your Kanban board in a view customized to best suit a large screen. Perfect for daily stand-ups or other work related meetings, but most of all – a great parallel to the original Kanban whiteboard idea, and a fantastic information radiator for the whole team. To enable it, open your Kanban board view in Chrome, switch it on in the top right corner - right next to the tools+ section, choose a receiver and see it loading.

17. Cloning your boards

Once you've created a board layout that you love, it would be an unnecessary effort to have to create another one from scratch. For that reason we have prepared the option to clone an existing board. You can either clone the layout only, or the whole board with the existing tasks.
To clone a board, you have to come back to the dashboard, where all of your existing boards are displayed. Then just click “more → clone”.

You will be transferred to a board cloning screen, where you can give a name to the new board, provide a description and even place it inside a folder (if any have been created). Most importantly, here you can also choose whether to copy it with tasks or without them.

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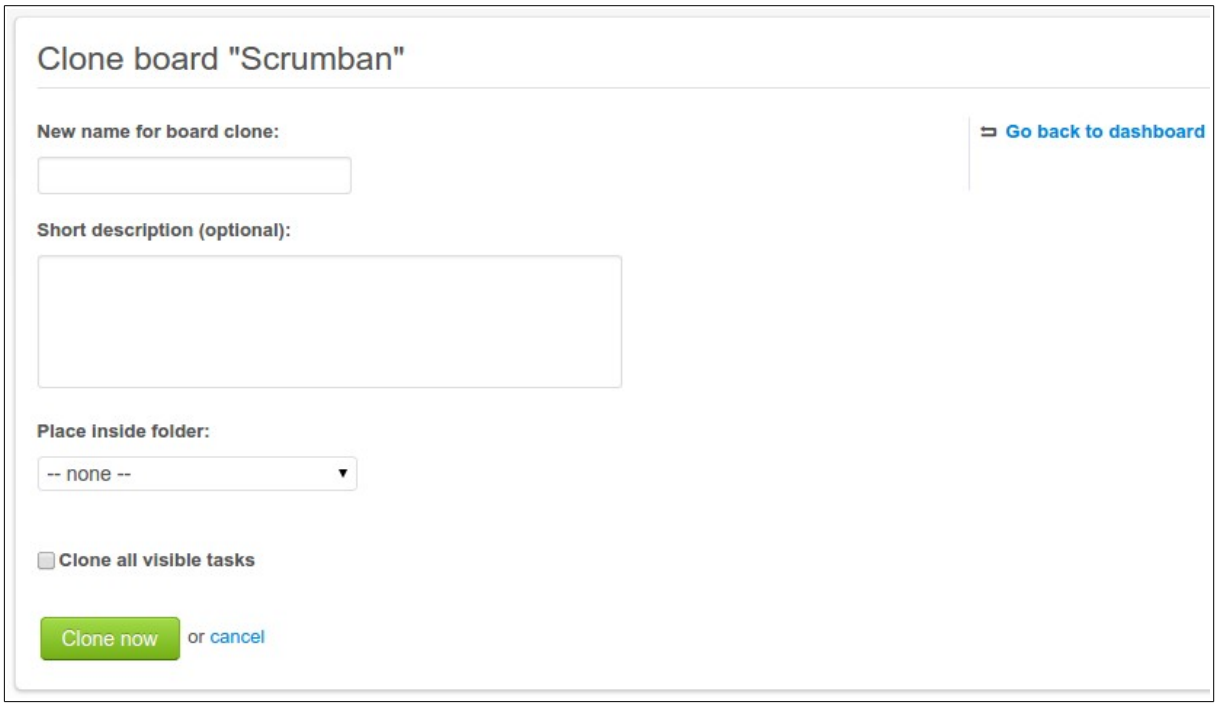
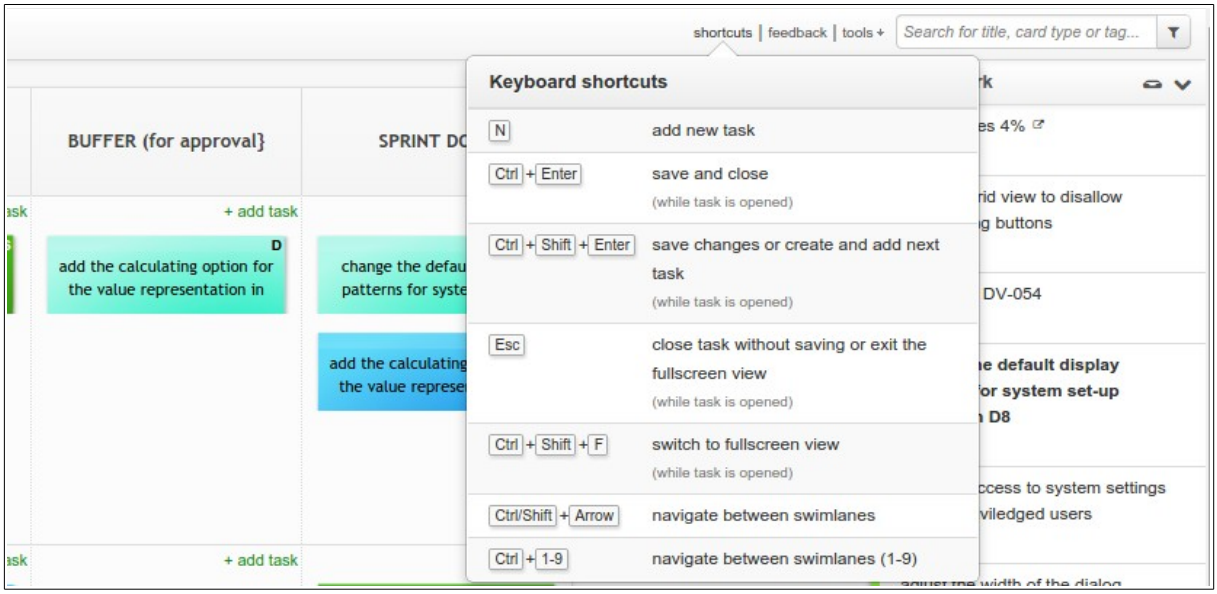


20. Speeding up your work – shortcuts

In the top right section of the headline you can see the “shortcuts” sign. By moving the cursor over it you can display a list of useful keyboard shortcuts that can be used to speed up your work while using the KanbanTool board.


shortcuts | feedback | tools +
Search for title, card type or tag...
Keyboard shortcuts
N add new task
Ctrl + Enter save and close (while task is opened)
Ctrl + Shift + Enter save changes or create and add next task (while task is opened)
Esc close task without saving or exit the fullscreen view (while task is opened)
Ctrl + Shift + F switch to fullscreen view (while task is opened)
Ctrl/Shift + Arrow navigate between swimlanes
Ctrl + 1-9 navigate between swimlanes (1-9)
BUFFER (for approval}
+ add task
add the calculating option for the value representation in

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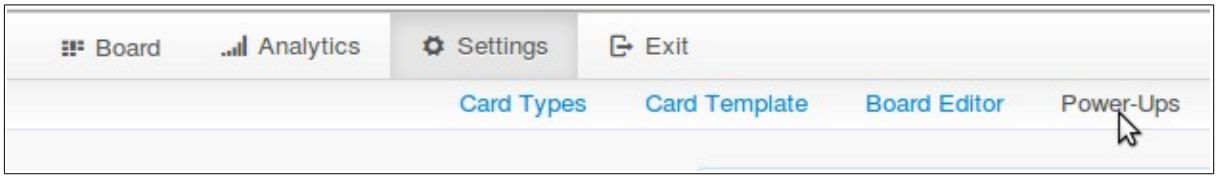
21. Power-Ups

With Power-Ups you can customize your boards and fine-tune your experience with KanbanTool. We are constantly working on developing new features, that will add to KanbanTool's usefulness.

To get started, go to Settings → Power-Ups and enable those that you fancy using.



Here is an outline of what Power-Ups you will find there, followed by a detailed description of each of them.

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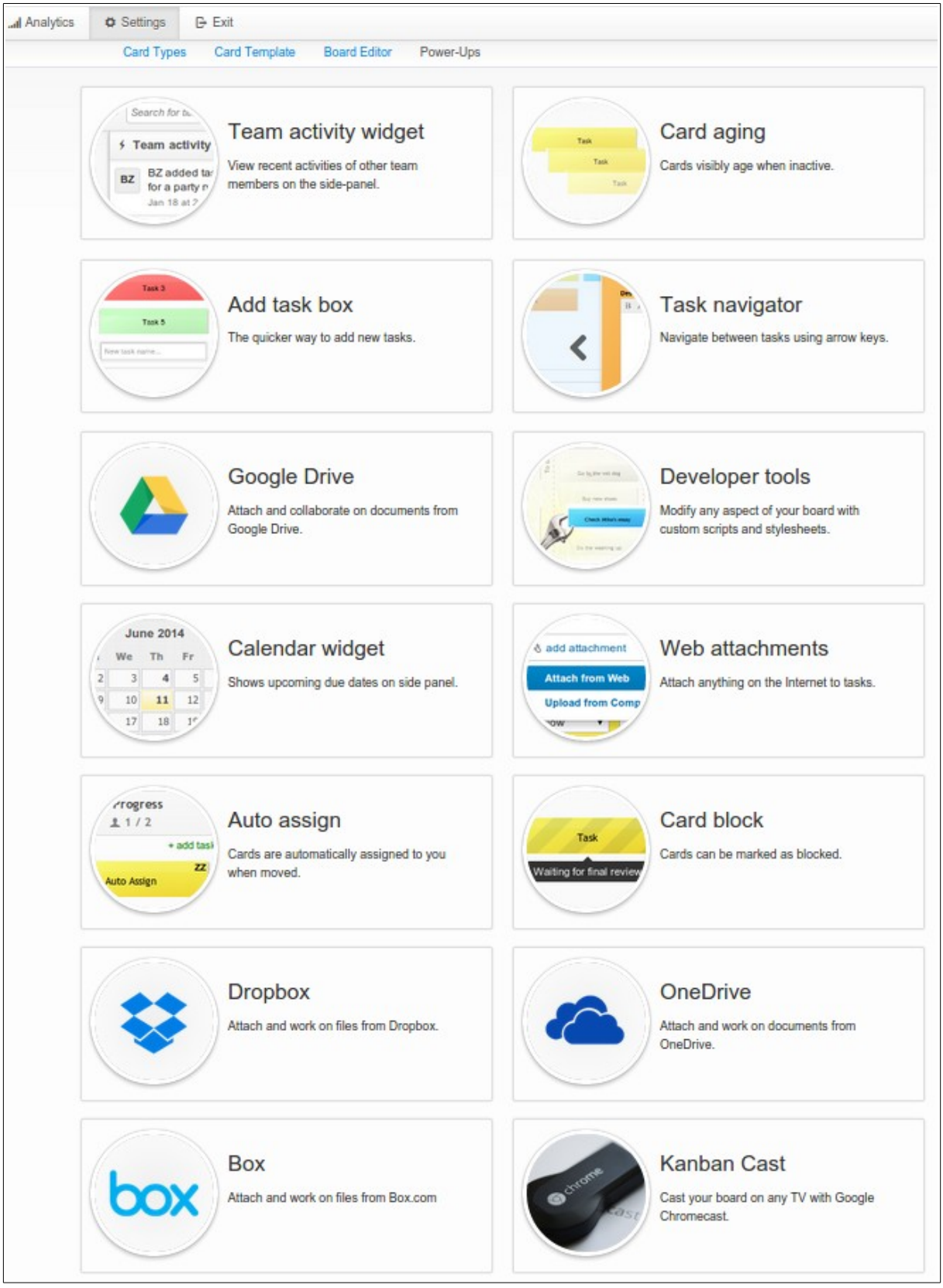

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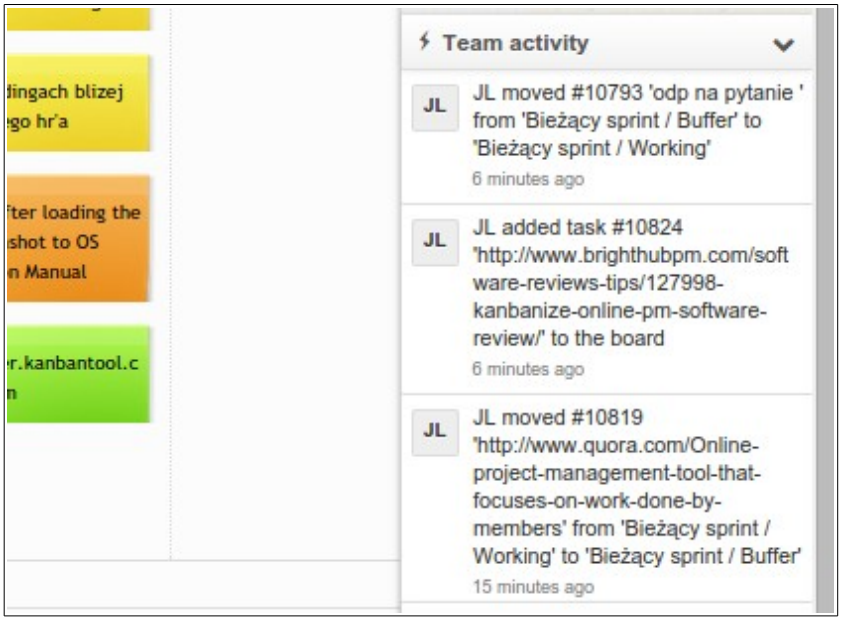
Team activity widget

This is a useful log of activity on the board. Displayed in the side panel, this will inform you about recent happenings on the board. New comments posted, tasks being moved, edited or deleted, and more. Enable it if you want to make sure that you're always up to date with what's going on.

This Power-Up can be accompanied by My Activity script, available in the Developer Tools.

By enabling this, you will also see the information about what you've been changing on the board.


Team activity
JL
JL moved #10793 'odp na pytanie ' from 'Bieżący sprint / Buffer' to 'Bieżący sprint / Working'
6 minutes ago
JL
JL added task #10824 'http://www.brighthubpm.com/software-reviews-tips/127998-kanbanize-online-pm-software-review/' to the board
6 minutes ago
JL
JL moved #10819 'http://www.quora.com/Online-project-management-tool-that-focuses-on-work-done-by-members' from 'Bieżący sprint / Working' to 'Bieżący sprint / Buffer'
15 minutes ago

Card aging

With this Power-Up, the cards will begin to fade as they haven't been edited or active for some time (it's up to you what time that is exactly).

Card aging
Enabled
Task
Task
Task
With this power-up cards become more transparent as time passes without any activity.
Age thresholds are 7 , 14 and 30 days.

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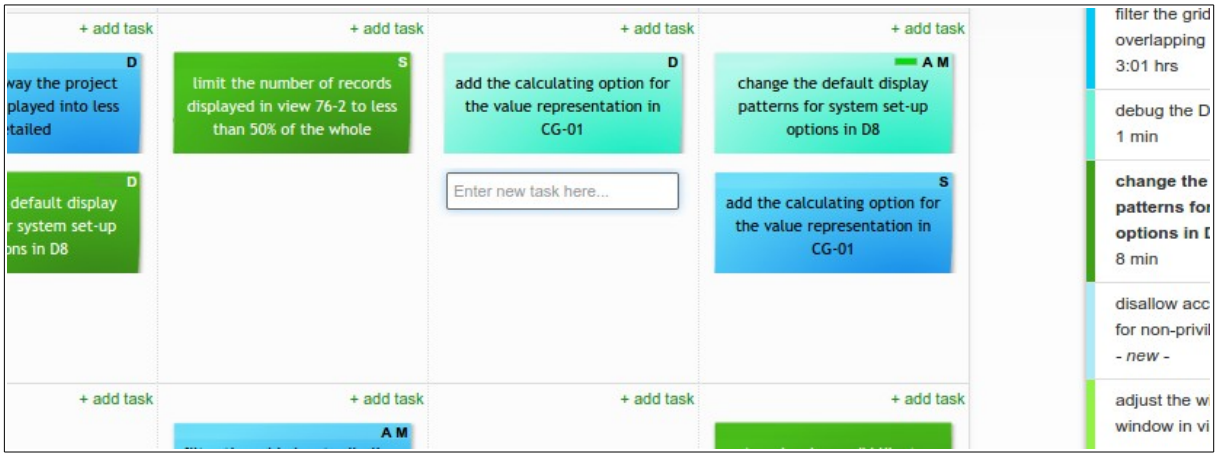
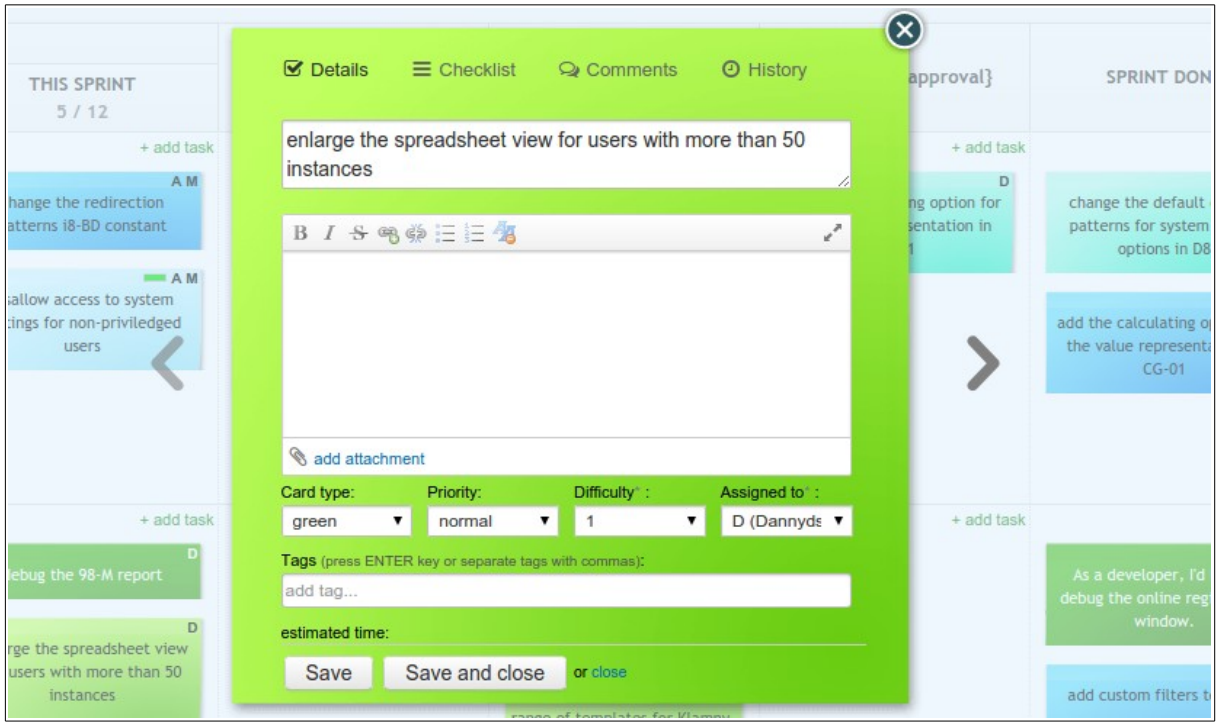
Add task box

By enabling this Power-up it will be even quicker to add new tasks. Once active, you will see a simple task box in a column, over which you'll hover. Simply by writing in the task name and hitting „enter” - the new task is placed on the board.


+ add task
limit the number of records displayed in view 76-2 to less than 50% of the whole
add the calculating option for the value representation in CG-01
change the default display patterns for system set-up options in D8
Enter new task here...
filter the grid overlapping 3:01 hrs
debug the D 1 min
change the patterns for options in D 8 min
disallow acc for non-privil - new -
adjust the w window in vi

Task navigator

There are situations, when you want to view or edit a number of tasks at a time. Once you've switched this Power-Up on, whenever you open a task card, useful arrows on each side appear. The arrows are to speed up the navigation between tasks, and save you having to open and close tasks by hand. Just click an arrow to move to the next task within a column.



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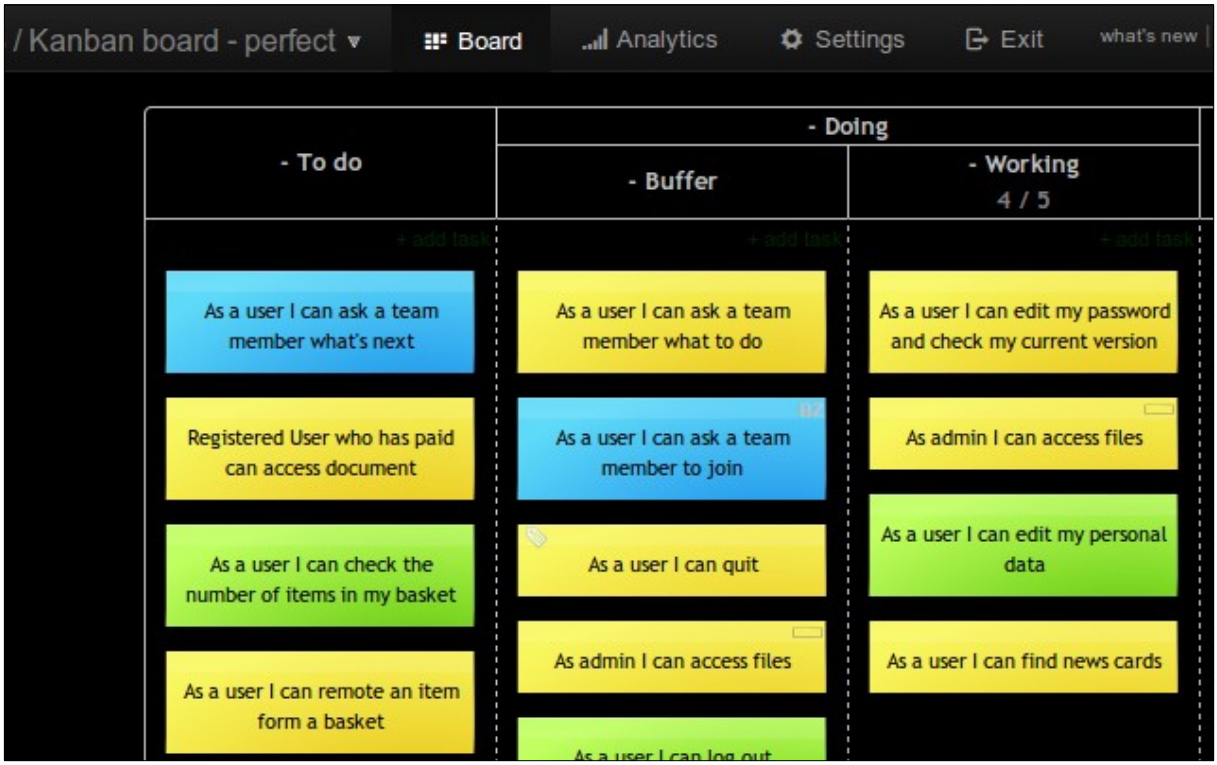
Developer Tools

Thanks to this Power-Up you can add custom scripts and style sheets to your board. At the moment we offer scripts, that enable you to:

- Change the design of the board into a High Contrast mode. Once you've added it to your chosen Developer Tools, go to the board view and click on Tools → high contrast mode;


/ Kanban board - perfect
Board
Analytics
Settings
Exit
what's new
- To do
- Doing
- Buffer
- Working
4 / 5
As a user I can ask a team member what's next
Registered User who has paid can access document
As a user I can check the number of items in my basket
As a user I can remote an item form a basket
As a user I can ask a team member what to do
As a user I can ask a team member to join
As a user I can quit
As admin I can access files
As a user I can edit my password and check my current version
As admin I can access files
As a user I can edit my personal data
As a user I can find news cards

- Large Font – enlarges the board font size. Use „medium-font.css" to make the font slightly bigger, and „large-font.css" to make it extra large. You can join this script with High-contrast to get an even greater experience on large TV displays.

- Apply a Card Tilt, that will make the cards look more like real-life sticky notes;

- Add an option to Delete all cards in a column;

- Sorting animations – this one makes cards animate on movement;

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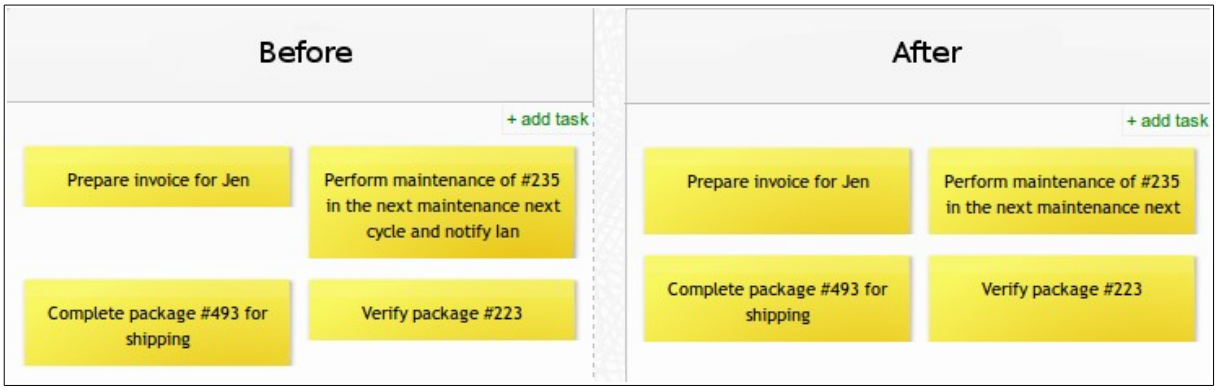
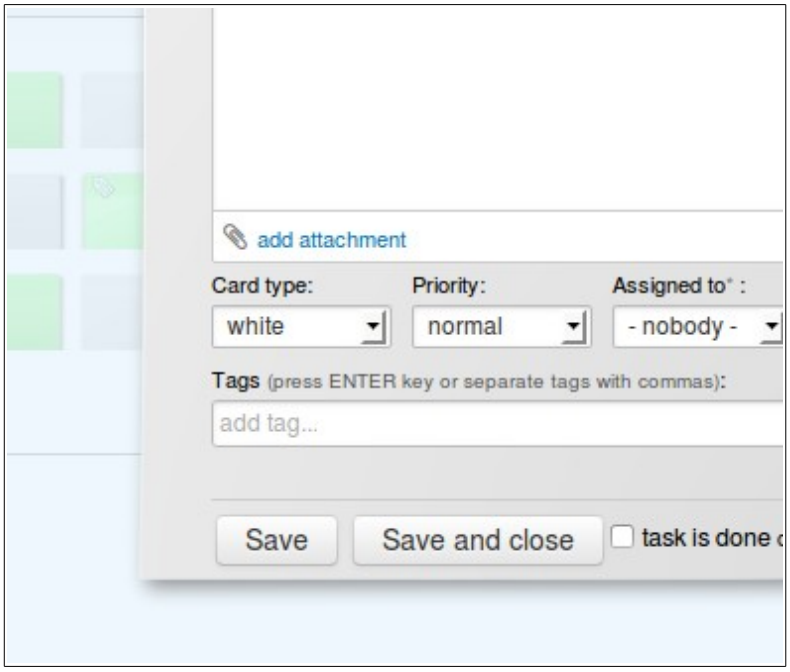
- Fixed card height – can be achieved with this script, it's especially useful for wide columns with many cards, that have different length's description, and therefore the board looks unordered. This script blocks auto-scaling feature of cards and makes them appear next to each other without spaces in between them.


Before
+ add task
Prepare invoice for Jen
Perform maintenance of #235 in the next maintenance next cycle and notify Ian
Complete package #493 for shipping
Verify package #223
After
+ add task
Prepare invoice for Jen
Perform maintenance of #235 in the next maintenance next
Complete package #493 for shipping
Verify package #223

- A Save and done button will be added to the task card, and once you tick this, the card will be moved to the last column of the board; A similar effect can be achieved with the Task done script, but this one adds the option to the context menu (right-click on a task while in board view).



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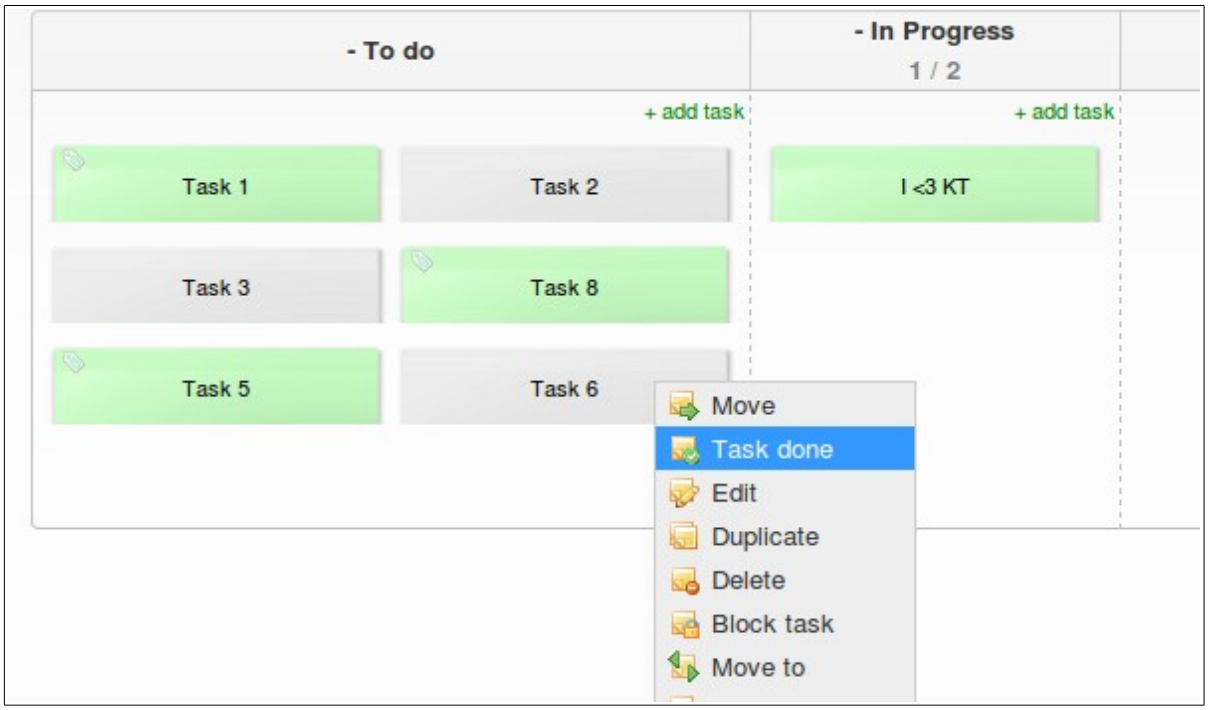
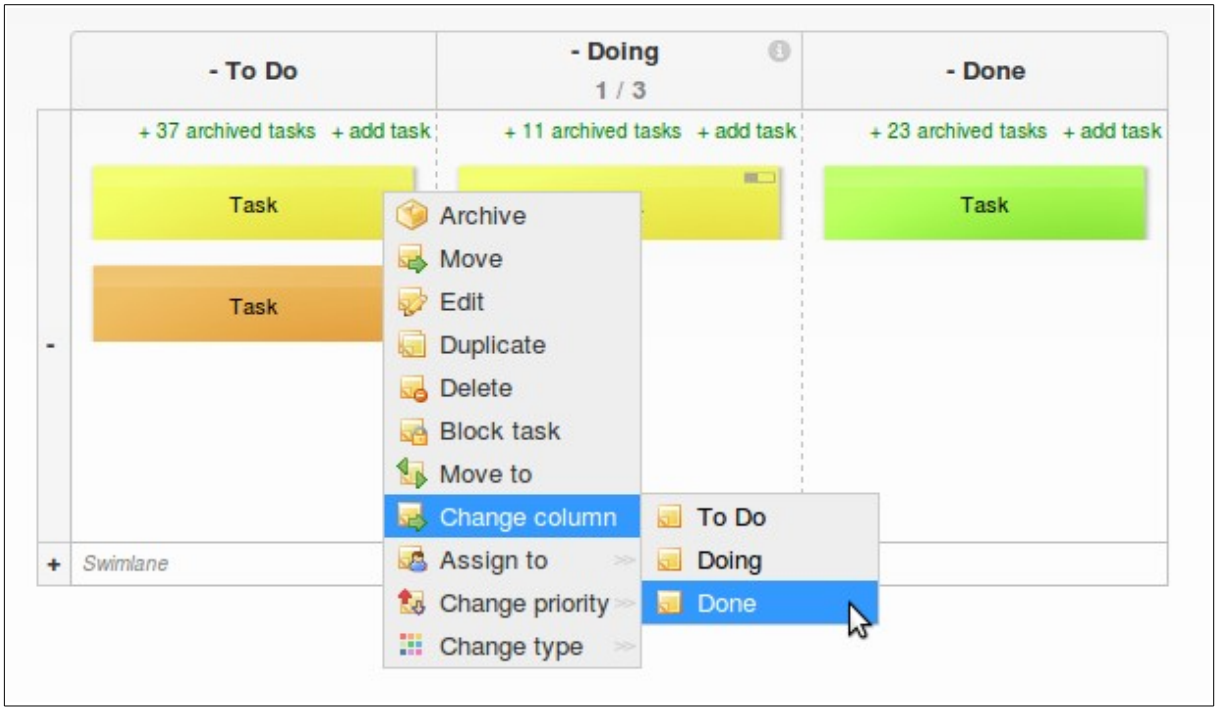


- When you'd like to move a task to a particular column on the board, but this is not necessarily the closest to its current position, you can benefit from the Change column script. It will allow you to send the task to any column within the board.



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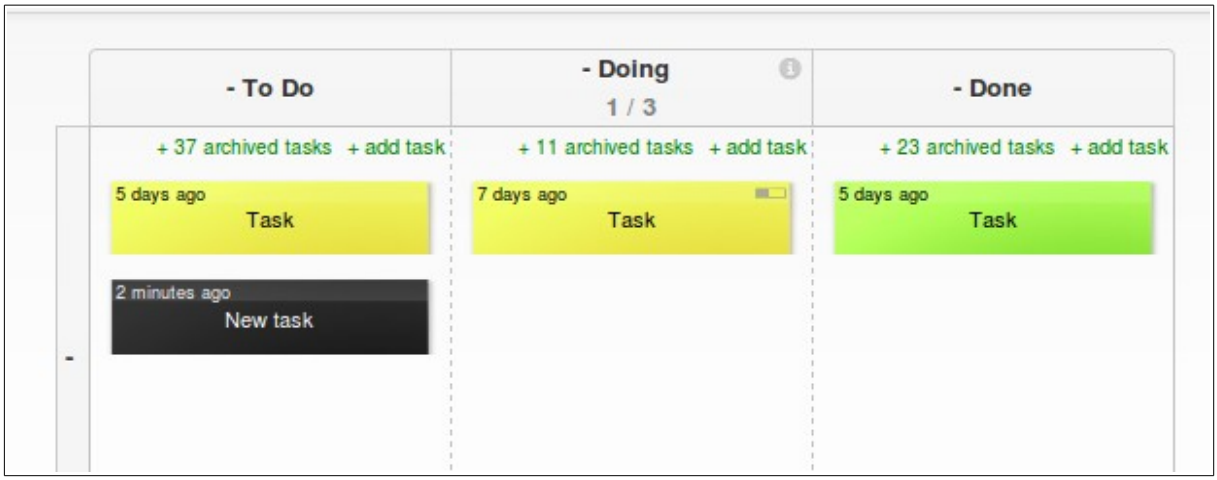
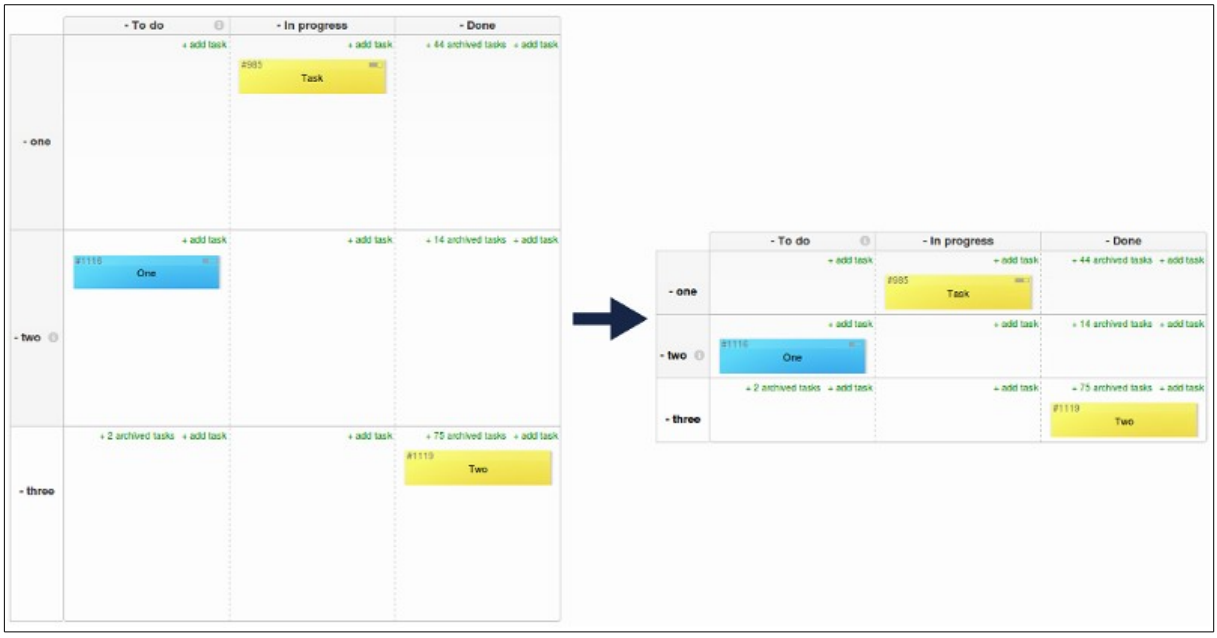
- If you're interested in seeing the amount of time that a task has spent on the board, you can use the Working time script, which will make this exact information display on the front of the card.



- By default, a swimlane height is equal to a couple of cards' height (also when the swimlane is empty). To alter this, use the Swimlane height script. It will make all the swimlanes equal just one cards' height.



- Should you want to integrate your Kanban Tool and Jira accounts, please follow these steps, and you will end up with Kanbanira.

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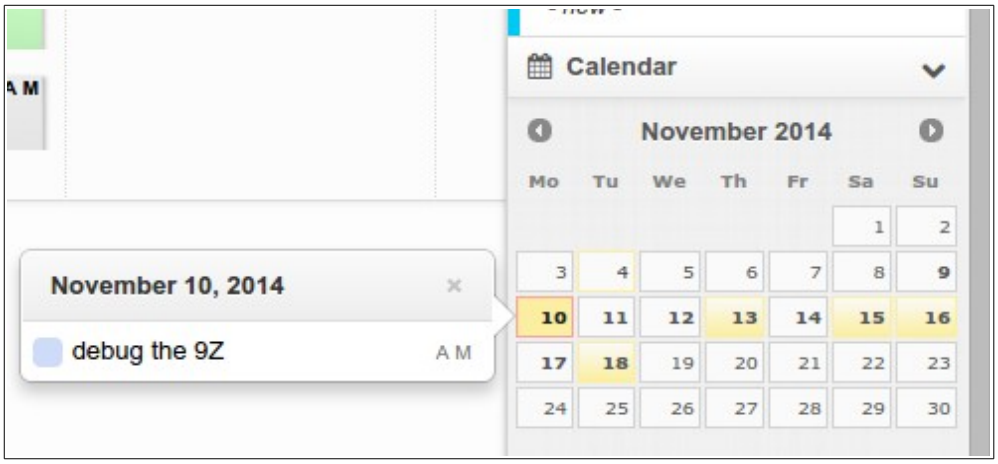
- The My activity script will add information about your activity to the Team Activity Power-Up.

All of these free scripts are available on: http://github.com/kanbantool/scripts.

Calendar widget

This Power-Up is a simple calendar, that will be displayed in the side panel. By default it will be highlighting your tasks' due dates in it. You can click on highlighted days to see what tasks are due when.



Web attachments

With this Power-Up you can link any address on the internet (a task, a board, a website) to a task card. To do this, simply click on the +add attachment link on your card and choose „Attach from the web” option.

Auto assign

Wouldn't it be great if just moving an unassigned card meant that it's being assigned to the user who moved it? This is what this Power-Up does.

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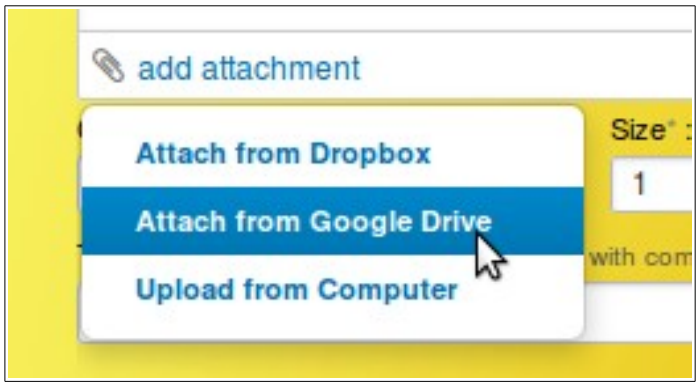
Card block

With this Power-Up cards can be marked as blocked from the context menu. Blocked cards cannot be moved, they have distinctive look (stripes) and a message explaining why they have been blocked.

Google Drive, Dropbox, One Drive and Box Power-Ups

Integrate your Kanban board with popular file hosting services. This will enable you to store file attachments on either service and easily access them through KanbanTool.

To use this type of integration, please go to Settings → Power-Ups, and enable the ones that you wish to use. Now you will be able to add and link file attachments from any of these services.



You will now be able to add documents to your tasks and access them directly through the stored link. Google Drive will allow you to collaborate on your attached documents in real time.

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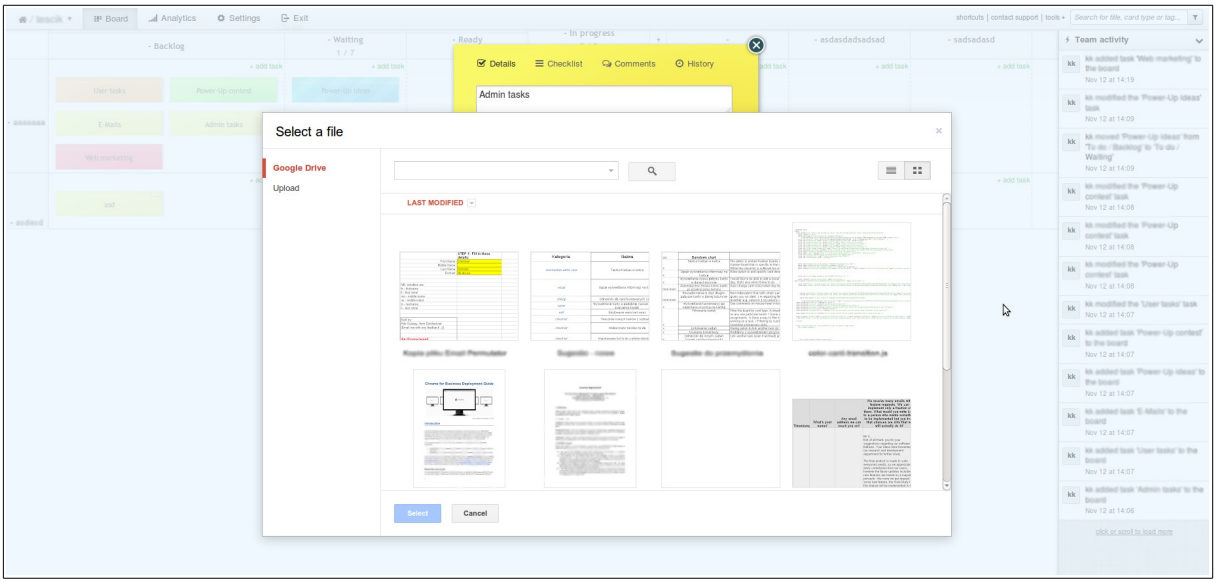

Kanban Cast

This integration has been characterized in section 16, (page 37) of this User Manual.

22. One-Click access to KanbanTool

KanbanTool offers you a quick and secure access to KanbanTool with SAML2 based One-Click authentication. This solution helps to centralize the access control and allows your employees to access KanbanTool and other services without a password.

This integration will allow all your team members to log in to KanbanTool with just one click. Also creating new accounts is much simpler, just add a new person's profile to the identity provider's service. Similarly, when someone leaves your company, you'll be able to delete their profile with a single modification.

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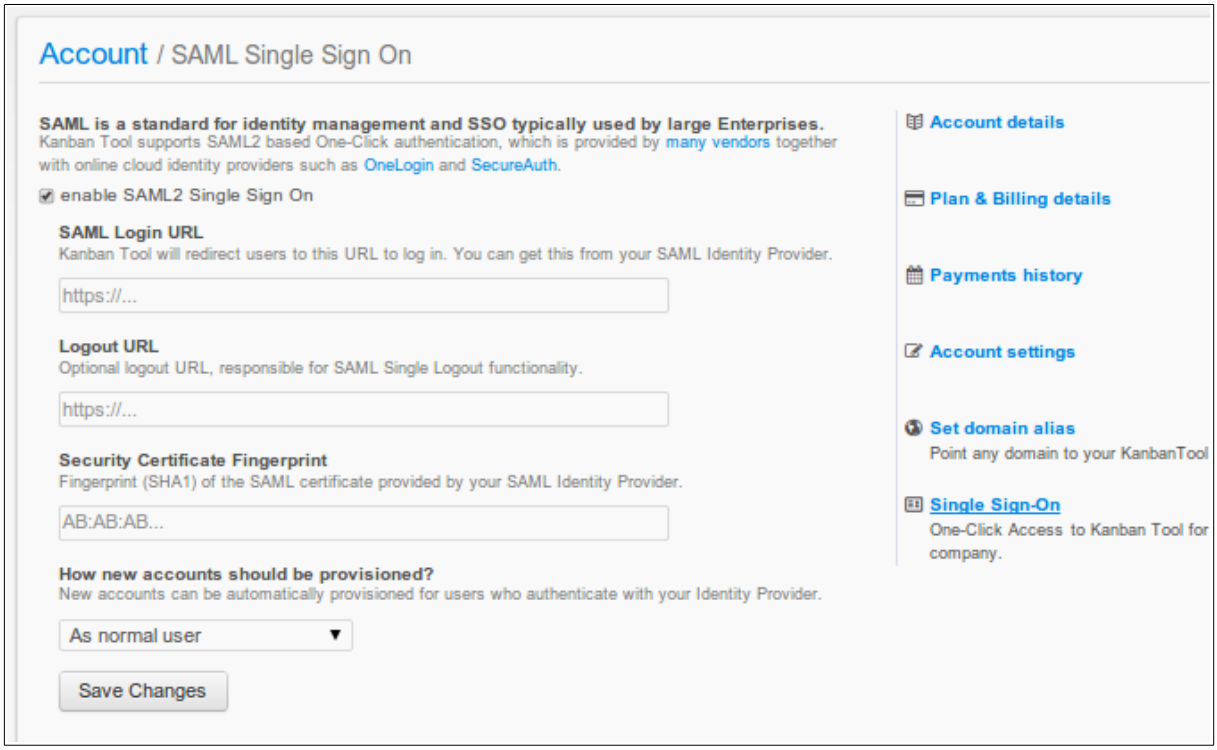
Account / SAML Single Sign On
SAML is a standard for identity management and SSO typically used by large Enterprises.
Kanban Tool supports SAML2 based One-Click authentication, which is provided by many vendors together with online cloud identity providers such as OneLogin and SecureAuth.
enable SAML2 Single Sign On
SAML Login URL
Kanban Tool will redirect users to this URL to log in. You can get this from your SAML Identity Provider.
https://...
Logout URL
Optional logout URL, responsible for SAML Single Logout functionality.
https://...
Security Certificate Fingerprint
Fingerprint (SHA1) of the SAML certificate provided by your SAML Identity Provider.
AB:AB:AB...
How new accounts should be provisioned?
New accounts can be automatically provisioned for users who authenticate with your Identity Provider.
As normal user
Save Changes
Account details
Plan & Billing details
Payments history
Account settings
Set domain alias
Point any domain to your KanbanTool
Single Sign-On
One-Click Access to Kanban Tool for company.

To enable it for your team - you will first need to have an account with one of the identity providers (an example: OneLogin, SecureAuth). Then, from the KanbanTool's Owner Account go to Account Administration panel, then Single Sign-On and click right next to the "enable SAML2 Single Sign On". Here you will need to fill in the information provided by the identity provider's service. From here your team is all set.

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